

Louisiana Visitor Conversion

April 2014



Louisiana Visitor Conversion
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Growth summary



Your business issues

Continuing to increase every year since 2009, 26.3 million people visited Louisiana in 2012 and 1.2 million of them were greeted at Louisiana welcome centers. Those visitors spent \$10.7 billion in the state.

Louisiana Office of Tourism specifically wants to choose the best funnels to attract ever more visitors to the state, specifically:

- How visitors get to the state
- Which activities/attractions draw visitors
- How visitors interact with media; which are most effective
- Importance of Louisiana Travel marketing materials on decision to visit Louisiana: Tour guides/brochures, map, website, web surfing, toll free numbers, social media, television, print, online banner ads.

Growth summary



Growth insights

- In-state and nearby states represent the most viable markets for Louisiana, as these areas represent a disproportionate share of visitors who drive there. Even New Orleans, with nationwide appeal, attracts more than half its visitors from Louisiana, Texas, Mississippi, or Arkansas.
- Louisiana has many activities and features to appeal to different tastes, so messaging can vary by market. Features that Louisiana can leverage (high in both importance and performance) include regional cuisine, lots to do, value, weather, and scenery. In contrast, safety (important but low performance) warrants attention.
- Those viewing ads or using Louisiana Travel react very positively, with *made me want to return* and *web surf/browse* leading all other behaviors. Boosted by other media (25% visit the website after viewing another ad), the website has double the exposure of print/television/banner/or social media and is the most likely to generate some form of positive impact.
- Visitors find Louisiana Travel's materials important in trip decision-making, especially the web, but also printed material some people still crave: tour guide/brochures and maps. Advertising (especially TV) also contributes to choosing Louisiana.

Precise plans for growth

- Continue to concentrate on the within-driving-distance markets where most visitors live, particularly Texas.
- Stress activities that appeal to everyone, such as local cuisine, and in some markets, add activities prevalent in the area, such as gaming, historical/educational features, and sightseeing.
- Strengthen Louisiana's safe/secure image, but without drawing undue attention to it – i.e., improve it, but without reminding visitors that it is an issue.
- Continue to utilize various media because they work together to build interest in the state and can funnel visitors to the website. Since the current television ads focus on music as well as food, radio ads could be effective as well.
- Support and enhance the website so that potential visitors who surf the web, whether stimulated by other Louisiana advertising or not, find the state enticing.
- While printed materials that tangibly aid visitors (tour guides and maps) will remain important to many for some time, consider interactive travel apps that will appeal to younger visitors.

1

Executive Summary



Purpose and research methods

Purpose:

- Measure the stimuli that prompt visitors to come to Louisiana

Survey Timing:

- February 28 – March 17, 2014

Target Audience:

- Adults 18+
- Visited Louisiana in past 24 months (2012 – 2013)

Stimuli in 2013:

- Paid advertising (Print/TV/Digital)
- Owned media: Facebook, Twitter or the Louisiana website (www.louisianatravel.com)

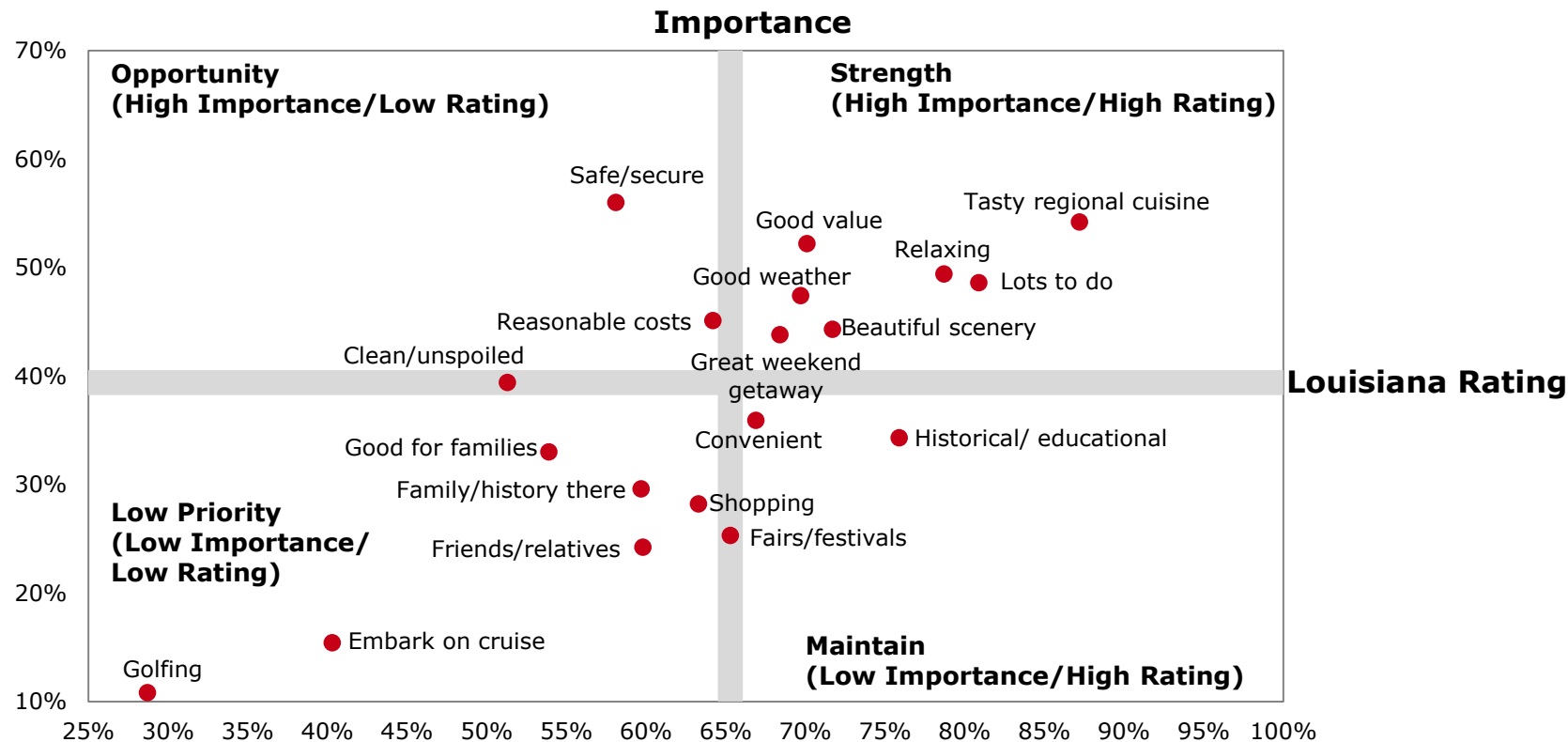
Research Methods:

- Online survey taken by Louisiana visitors (from TravelsAmerica)
- Weighted by age
- Measure recognition of Paid or Owned media

Executive summary

Activities to promote

- Visitors vote *tasty cuisine* as Louisiana's key strength and cite *safety* as the key challenge.



Q23: Using a scale of 1 to 10 (10=extremely important), please rate the importance of each of the following attributes when selecting a destination.
 Q24. For each of the attributes mentioned below, please rate how well Louisiana suits you.

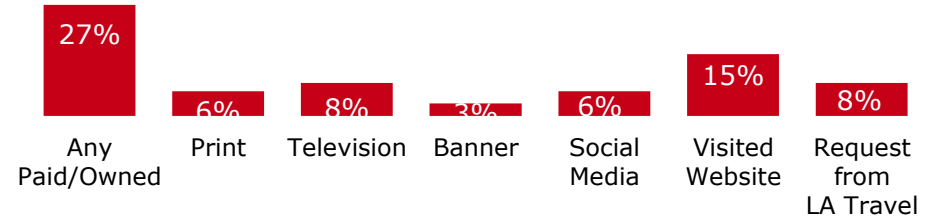
Executive summary

Impact of media

- Overall, a quarter notice ads/owned media, particularly New Orleans, Houma, Lafayette, and Alexandria visitors
- The website leads other ads/efforts
- The ads prompted positive action of nearly a fifth of all visitors (18%) – and persuaded a majority (67%) of those who saw the ads/owned media.
- Persuasion varies by market – especially strong for New Orleans and Shreveport; less so for Slidell/N. Shore and Lafayette.

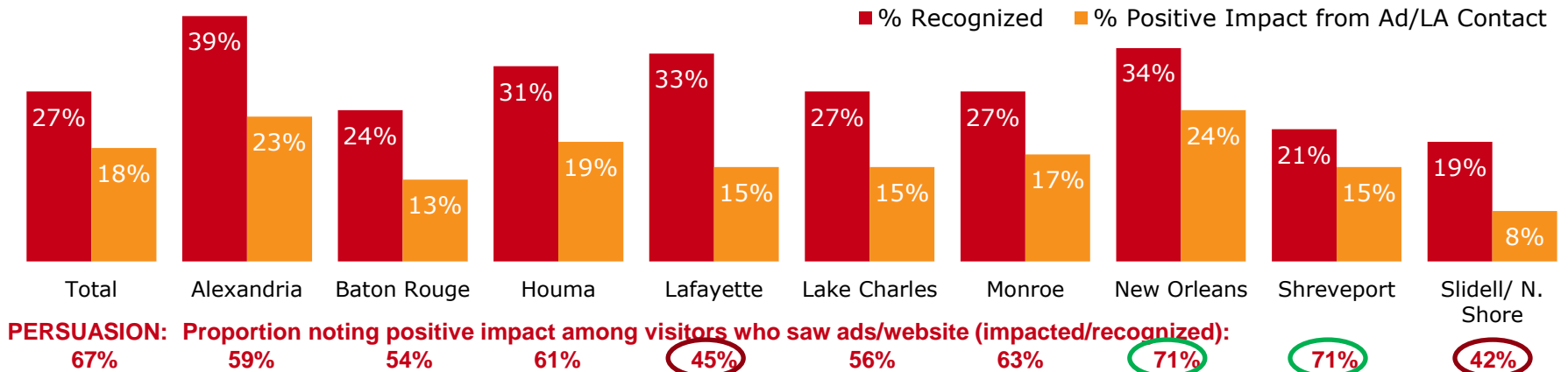
% Recognized Ads/Owned Media

Base: Past Year Louisiana Visitors (n=415)



Recognition (Paid/Owned) and Impact by Destination

Base: Past Year Louisiana Visitors (n=415)



Q28/Q32/Q34/Q36/Q37/Q26. Abridged: Have you seen any of these print/TV commercials/online ads/ social media pages/the www.louisianatravel.com website or requested information from Louisiana Travel prior to your last visit?

Q39. How did the ads or materials/information provided impact your decision to take a leisure trip to Louisiana?

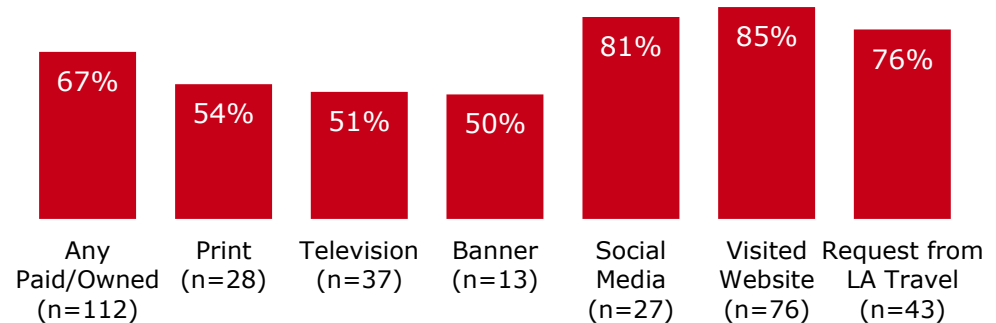
Executive summary

Action taken

- Clearly influencing behavior, two-thirds of visitors take a positive action after viewing ads/media – primarily:
 - Making them want to return
 - Searching the website
 - Seeking more information

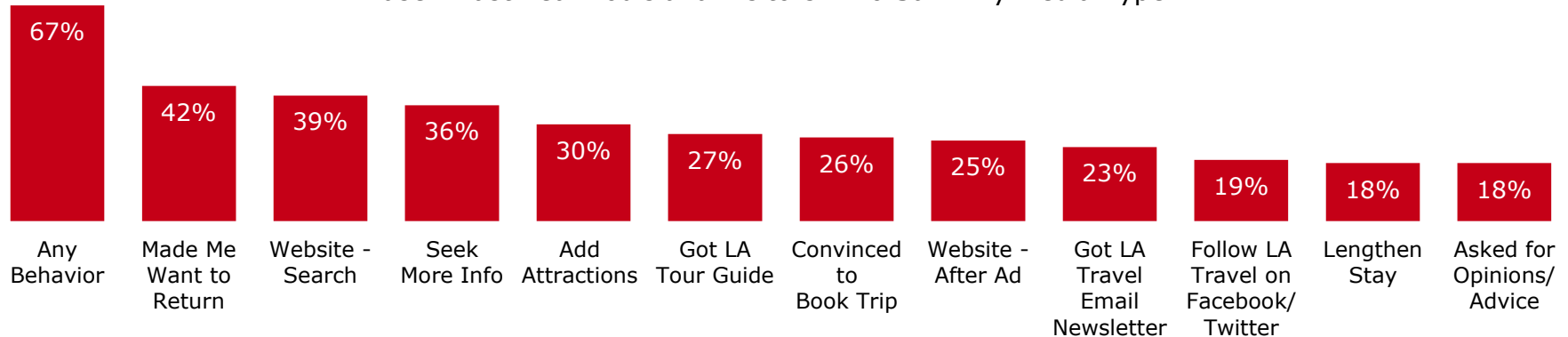
% Citing Positive Impact from Ads/Media

Base: Past Year Louisiana Visitors Who Saw Media Type



Top Behaviors Caused by Ads

Base: Past Year Louisiana Visitors Who Saw Any Media Type



Q39. How did the ads or materials/information provided impact your decision to take a leisure trip to Louisiana?



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Executive summary

Different ads/media motivate different actions

- Viewer/users of every ad/media named *made me want to return to Louisiana* as one of their top five behaviors
- Getting the *Official Louisiana Tour Guide* also makes the “short list” every time
- *Adding attractions* appears for all ads/media except print.

Top Five Actions by Ads/Media

Base: Past Year Louisiana Visitors Who Saw Media Type

Past Year LA Visitors (n=112)	Request from LA Travel (n=43)	Visited Website (n=76)	Saw Print Ad (n=28)	Saw TV Commercial (n=37)	Saw Online Ad (n=13)	Saw Social Media Pages (n=27)
Any (67%)	Any (76%)	Any (85%)	Any (54%)	Any (51%)	Any (50%)	Any (81%)
Made Me Want to Return (42%)	Went to Website During Search (55%)	Went to Website During Search (58%)	Made Me Want to Return (31%)	Added Attractions to Visit (32%)	Added Attractions to Visit (50%)	Convinced to Book Trip (61%)
Went to Website During Search (39%)	Seek More Information (48%)	Made Me Want to Return (55%)	Seek More Information (31%)	Seek More Information (29%)	Lengthened Stay (41%)	Went to Website During Search (57%)
Seek More Information (36%)	Added Attractions to Visit (47%)	Seek More Information (48%)	Asked for Opinions/Advice (31%)	Got Official LA Tour Guide (29%)	Got Official LA Tour Guide (37%)	Made Me Want to Return (51%)
Added Attractions to Visit (30%)	Made Me Want to Return (44%)	Added Attractions to Visit (41%)	Follow LA Travel on Facebook/Twitter (27%)	Lengthened Stay (27%)	Made Me Want to Return (32%)	Added Attractions to Visit (49%)
Got Official LA Tour Guide (27%)	Got Official LA Tour Guide (44%)	Got Official LA Tour Guide (37%)	Got Official LA Tour Guide (27%)	Made Me Want to Return (26%)	Went to Website After Saw Ad (32%)	Got Official LA Tour Guide (47%)

Q39. How did the ads or materials/information provided impact your decision to take a leisure trip to Louisiana?

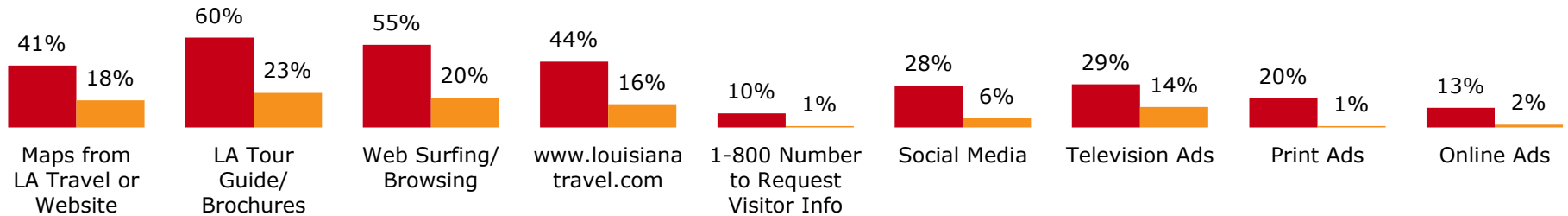
Executive summary

Not all marketing efforts are equal

- *Tour guides/brochures, web surfing/website, and maps* lead other marketing efforts, whether the visitors recognize ads or not
- *Television, print, and social media* also contribute to the Louisiana trip decision.

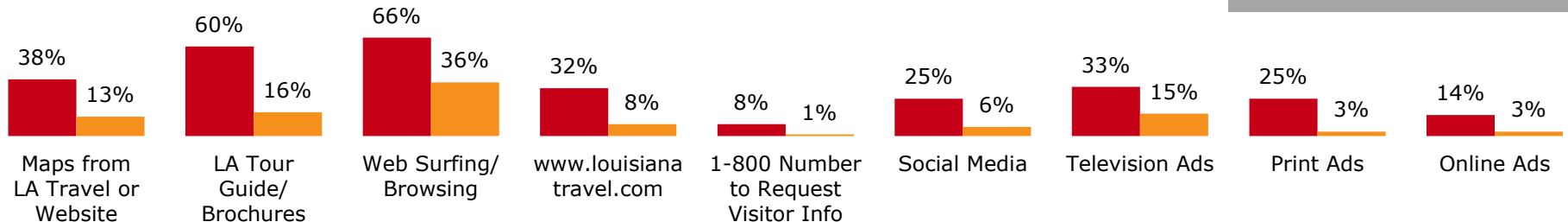
Most Important in Louisiana Trip Decision Making

Base: Saw Ads or Had Contact With Louisiana Travel/Website



■ Top 3 Most important ■ One Most Important

Base: Total Visitors



Q40. Which has the greatest effect on your decision to visit Louisiana?



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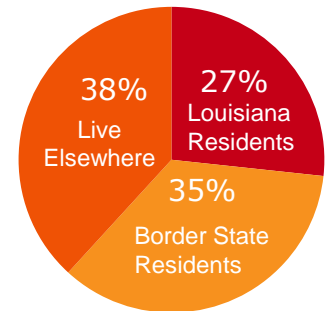
Executive summary

Where travelers go in Louisiana; where they live

- Louisiana entertains its own and border-state vacationers (especially Texas); *New Orleans, Baton Rouge, and Houma* more successfully draw distant travelers.

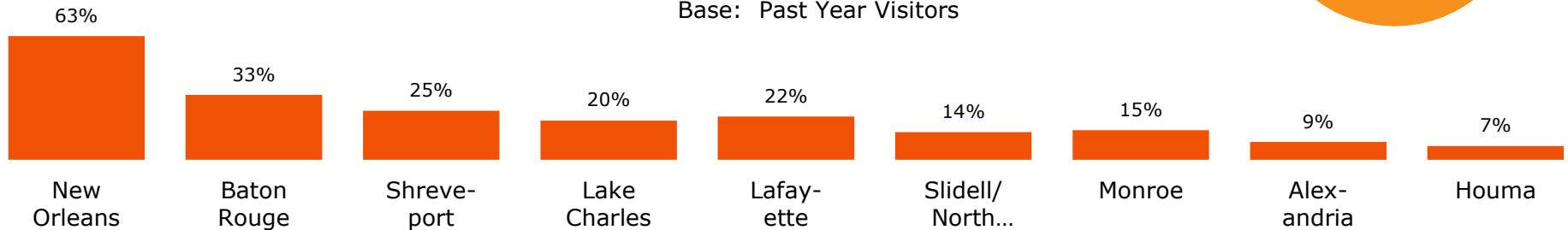
(Note: *in-staters more likely visit multiple LA places, so each area shows a higher proportion of them.*)

Total Louisiana Visitors



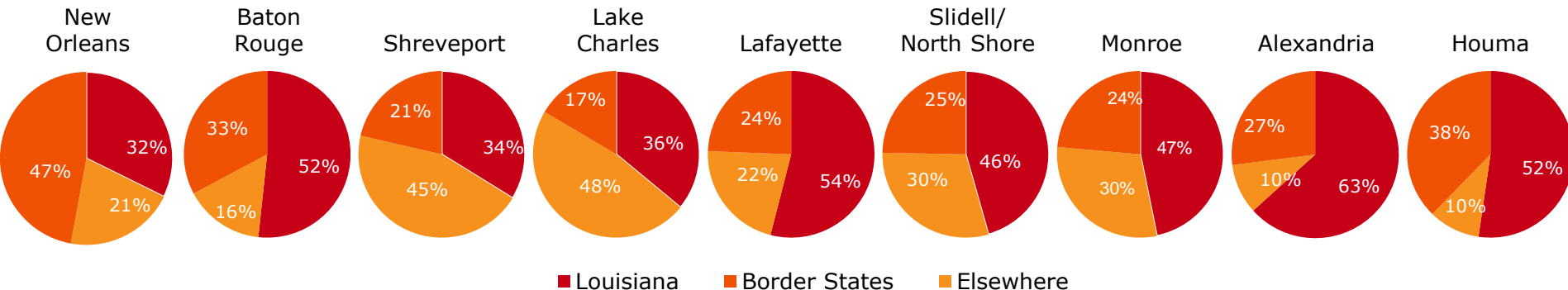
LA Visitors -- % Visiting Each Area (Where They Go)

Base: Past Year Visitors



Where They Live

Base: Past Year Visitors



■ Louisiana ■ Border States ■ Elsewhere

Q9: Where did you go in Louisiana on your last trip? Q11: On trips prior to your last trip, where else have you visited in Louisiana? Panel: Residence



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Executive summary

Cross-over visitation

- Luring leisure travelers to the state benefits multiple destinations.

Cross-Over Visitation: Where Past Year Visitors Have Ever Visited (Orange = 50%+)

Trip Destinations:

Also Visited (Ever):	Alex- andria	Baton Rouge	Houma	Lafay- ette	Lake Charles	Monroe	New Orleans	Shreve- port	Slidell/ N. Shore
Alexandria	100%	44%	37%	53%	43%	41%	28%	46%	32%
Baton Rouge	83%	100%	64%	89%	69%	64%	63%	63%	71%
Houma	28%	31%	100%	41%	32%	23%	23%	19%	45%
Lafayette	85%	62%	69%	100%	65%	48%	39%	51%	56%
Lake Charles	59%	53%	62%	62%	100%	45%	40%	48%	58%
Monroe	56%	40%	31%	44%	37%	100%	26%	49%	38%
New Orleans	85%	91%	92%	91%	87%	77%	100%	76%	98%
Shreveport	90%	51%	46%	61%	54%	63%	34%	100%	48%
Slidell/N. Shore	43%	44%	66%	50%	50%	42%	36%	25%	100%

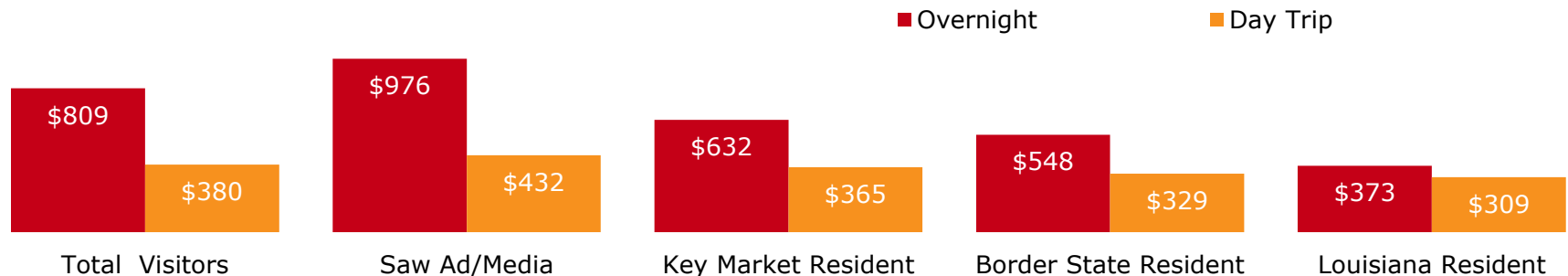
Q9. Where did you go in Louisiana on your last trip?

Q11: On trips prior to your last trip, where else have you visited in Louisiana?

Executive summary

Importance of tourism to Louisiana

- **Cruisers Contribute.** Although New Orleans represents only a small portion of Louisiana visitors (5%), almost half of them spend at least an extra day or two enjoying the city.
- **High Overnight Volume.** Most visitors spend the night (88% spent at least one overnight on at least one trip), and if they stay over, they average about four nights per trip.
- **Substantial Tourism Spending.** Overnighters spend more than twice as much as day-trippers (\$809 vs. \$380); further, those who saw ads/contacted LA Tourism/website spent even more (\$976 overnighters).



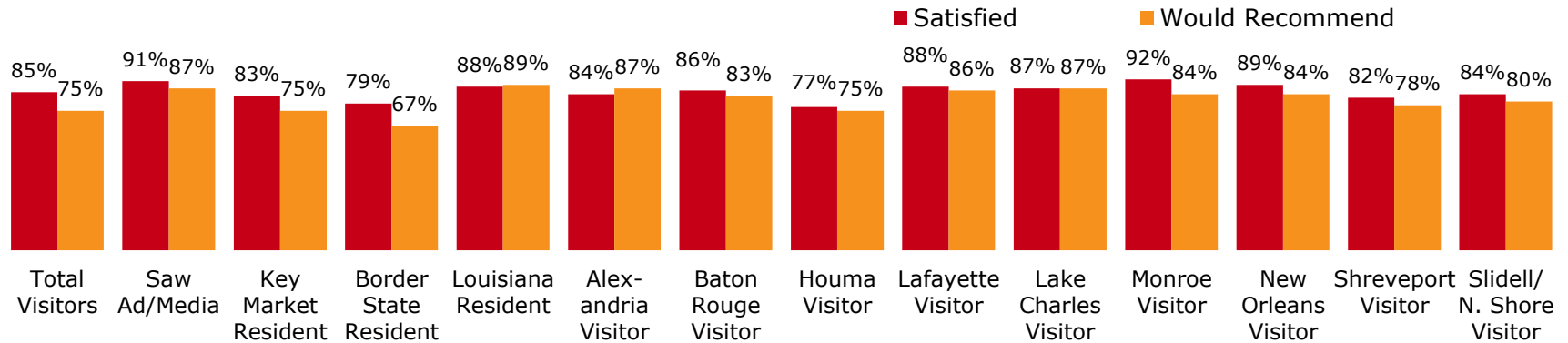
Q16. Please estimate the dollars your travel party spent for each category on your last overnight trip to Louisiana.

- **Most Drive.** Because Louisiana is convenient to most visitors, most drive their own auto; only New Orleans draws many visitors (24% fly) from longer distances.

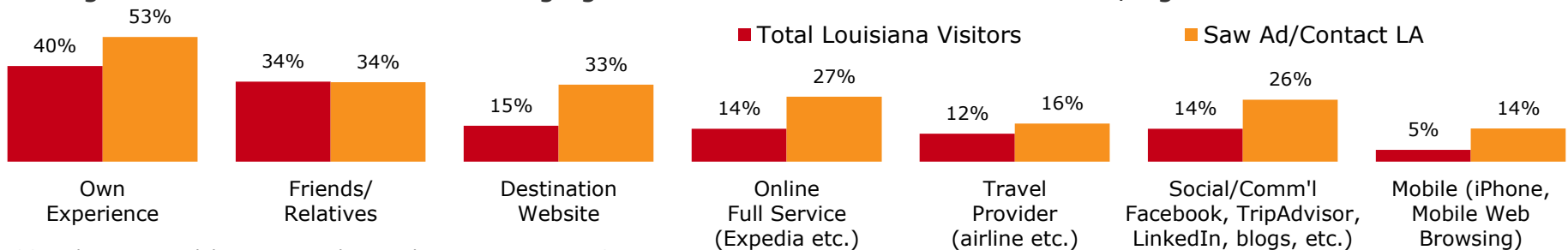
Executive summary

Importance of tourism to Louisiana *continued*

- **Visitors Go Home Happy and Enthusiastic.** More than four out of five note they are *very/extremely satisfied* with their visit and three-quarters *would recommend (very/extremely likely)* a Louisiana trip to others. Those exposed to Louisiana Travel messaging tend to be more satisfied than others; border state residents less so.



- **Word-of-Mouth Still Reigns.** Besides *own experience*, the frequent use of *friends and relatives* to plan a trip underscores the importance of *going home happy* and *recommending to others*, and likely to remain high even if the medium of exchanging information becomes more electronic/digital.



Q8. What sources did you use to plan your last trip to Louisiana?

Executive summary

Travel behaviors vary by destination

■ Messaging Considerations:

Destinations can align their marketing messages to fit with the travel patterns of their visitors (top areas noted in red):

Top Two Activities

Alexandria	Visit relatives 48%; Visit friends 38%
Baton Rouge	Visit relatives 45%; Shop 36%
Houma	Visit relatives 43%; Visit friends 35%
Lafayette	Visit relatives 44%; Shop 36%
Lake Charles	Visit relatives 36%; Visit friends/Shop tie 33%
Monroe	Visit relatives 31%; Casino/Gaming 28%
New Orleans	Shopping 44%; Fine dining 37%
Shreveport	Casino/Gaming 38%; Visit relatives 36%
Slidell/N Shore	Visit relatives 41%; Shop 29%

% VFR*

Alexandria	52%
Baton Rouge	53
Houma	48
Lafayette	52
Lake Charles	47
Monroe	50
New Orleans	43
Shreveport	47
Slidell/N Shore	46

% O/N** and # Nights

Alexandria	88%	3.4
Baton Rouge	89	4.0
Houma	98	6.9
Lafayette	92	4.4
Lake Charles	82	4.6
Monroe	84	2.7
New Orleans	91	4.3
Shreveport	85	2.8
Slidell/N Shore	86	5.1

O/N** Spending in LA

Alexandria	\$517
Baton Rouge	\$619
Houma	\$613
Lafayette	\$535
Lake Charles	\$526
Monroe	\$565
New Orleans	\$1,023
Shreveport	\$596
Slidell/N Shore	\$679

% Drive Own Auto

Alexandria	92%
Baton Rouge	83
Houma	94
Lafayette	92
Lake Charles	91
Monroe	95
New Orleans	71
Shreveport	90
Slidell/N Shore	84

*VFR: Visit Friends/Relatives (Primary Purpose)

** O/N: Overnight



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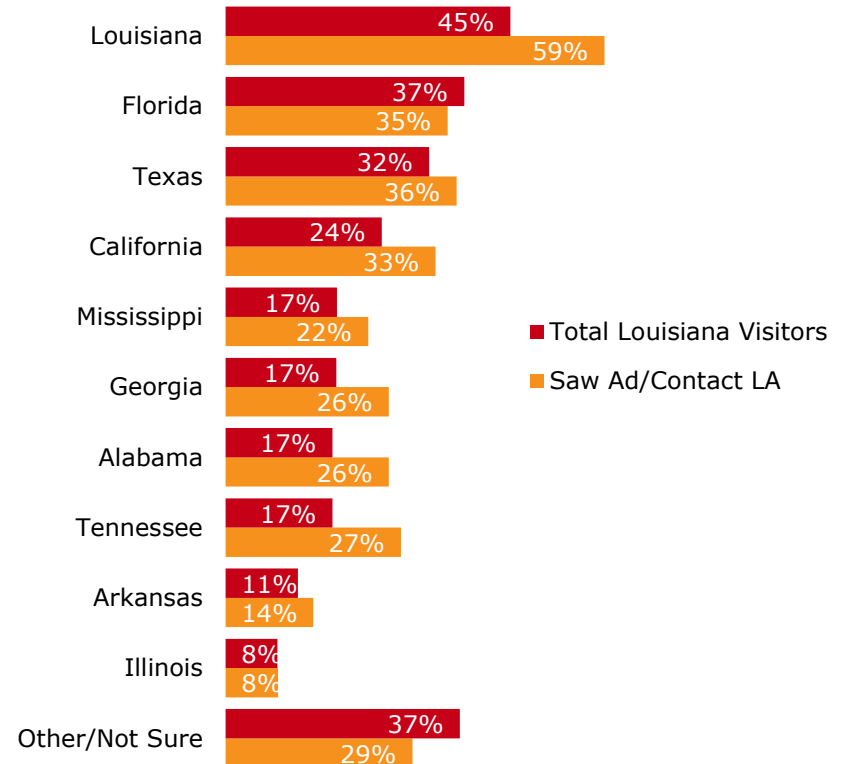
Executive summary

Competitively – watch your neighbors

- **Focus on the South.** Although some visitors venture outside the region, most stay in the South – proximity, because of both convenience and cost, plays a substantial role in destination choices. Eight of the top 10 destinations considered by Louisiana visitors are southern states (LA, FL, TX, MS, GA, AL, TN, AR).
- So ... in keeping an eye on the competitive environment, it becomes really important to “keep up with the Joneses.”

Future Areas Considered by Louisiana Visitors Key Competitors

Base: Louisiana Visitors (n=522)



2

Appendix: Detailed Results of the Research



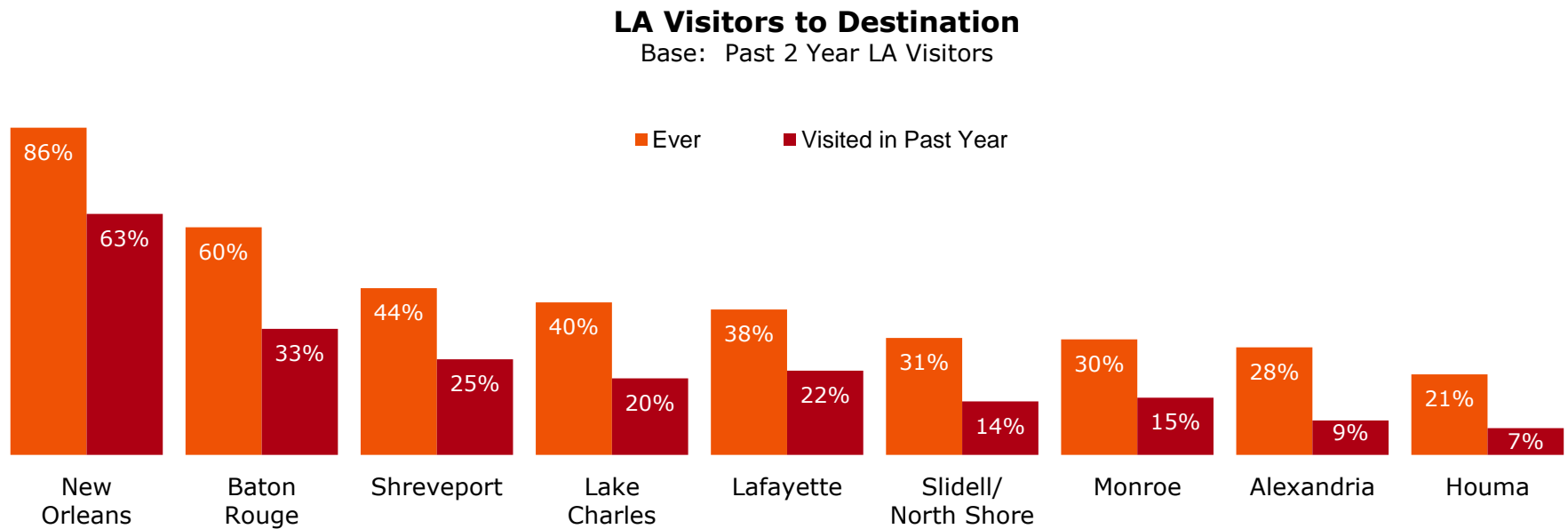
3

Source Markets and Louisiana Destinations



Top Louisiana destinations

- New Orleans and, secondarily, Baton Rouge draw the largest share of visitors.



Q9: Where did you go in Louisiana on your last trip? Q11: On trips prior to your last trip, where else have you visited in Louisiana? Panel: Residence



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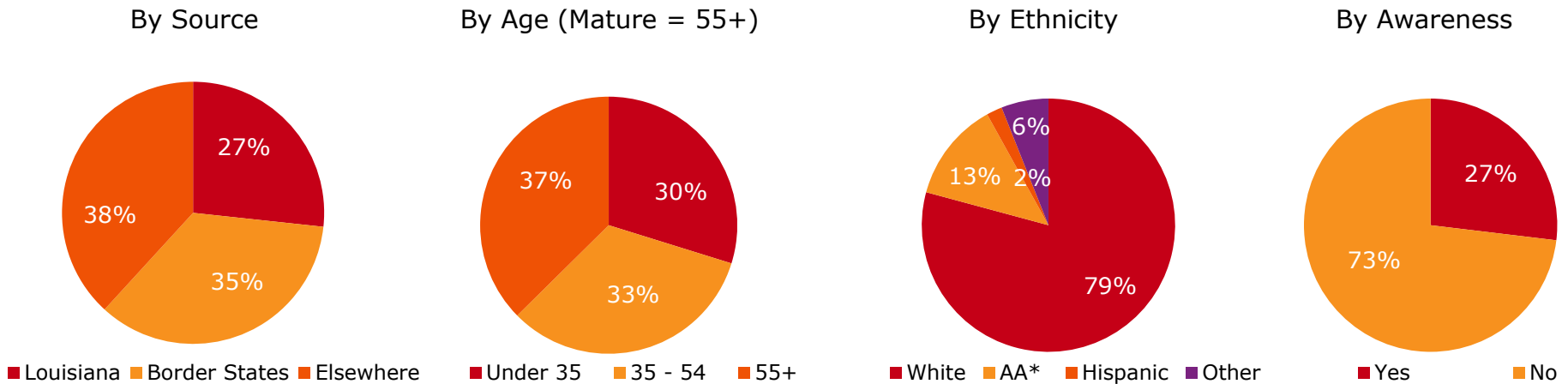
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Relative size of key segments

Market relevance

- The majority of Louisiana visitors live in-state or in a border state (primarily Texas at 26%)
- Visitors tend to be over 55 and primarily Caucasian
- More than a quarter recalled the ads.

Proportion of Past Year Louisiana Visitors by Segment



* African-American

Q1: How old are you? Q3: Panel: Residence and ethnicity

Caution: Note Small Sample (20) for Hispanics yields less reliable comparisons



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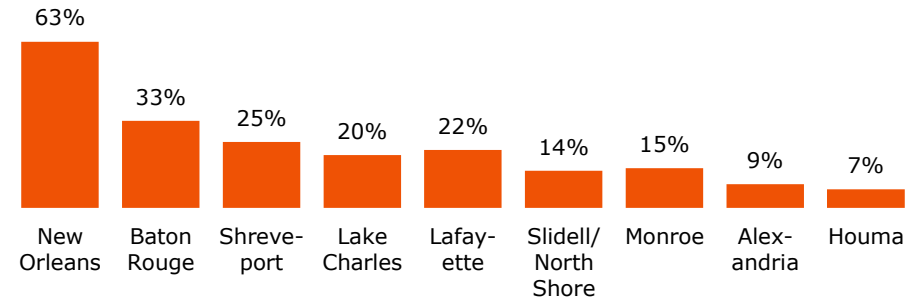
Source of visitors by Louisiana destinations

Market relevance

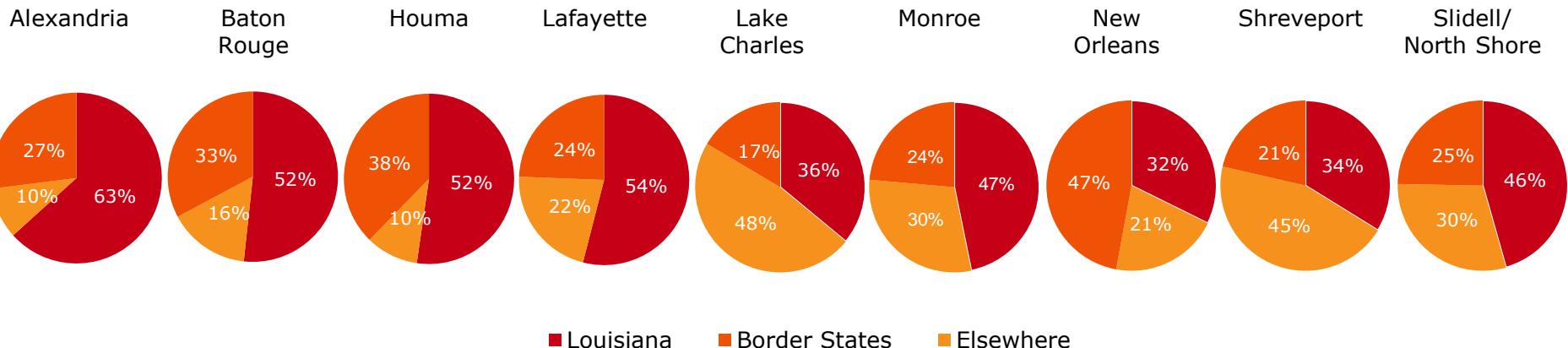
- New Orleans, Louisiana's largest city, and Baton Rouge, the second largest city and capital of the state, top the state destinations
- New Orleans, draws about half of its visitors from distant areas (beyond Louisiana or border states).

LA Visitors -- % Visiting Each Area

Base: Past Year Visitors



Proportion of Past Year Louisiana Visitors to Destination by Source



Q9: Where did you go in Louisiana on your last trip? Q11: On trips prior to your last trip, where else have you visited in Louisiana? Panel: Residence

Destinations within Louisiana

Cross-over visitation

- Considerable cross-over exists, although those traveling to New Orleans and Shreveport venture elsewhere less than those to other Louisiana destinations.

Cross-Over Visitation: Where Past Year Visitors Have Ever Visited (Orange = 50%+)

Trip Destinations:

Also Visited (Ever):	Alexandria	Baton Rouge	Houma	Lafayette	Lake Charles	Monroe	New Orleans	Shreveport	Slidell/N. Shore
Alexandria	100%	44%	37%	53%	43%	41%	28%	46%	32%
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Q9. Where did you go in Louisiana on your last trip?

Q11: On trips prior to your last trip, where else have you visited in Louisiana?



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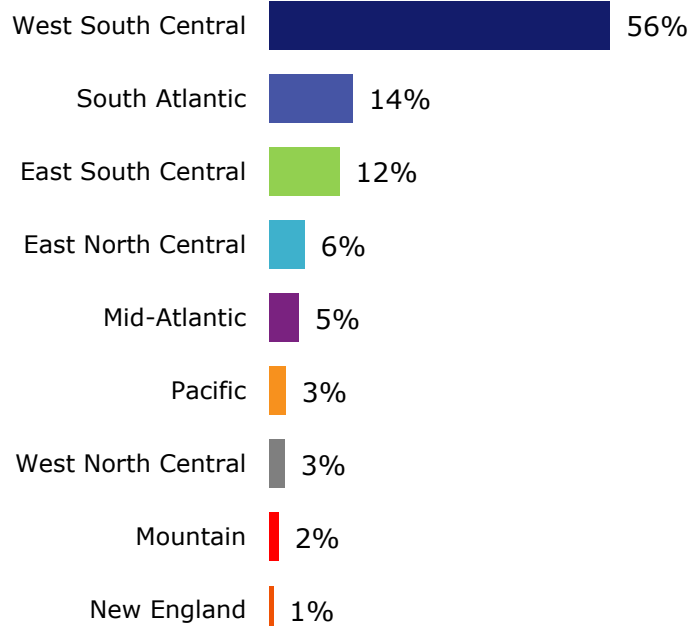
Visitors residence

Most visitors live in-state or in nearby states

- Louisiana draws most of its visitors from the West South Central census region, primarily from in-state residents (27%) and Texas (26%).

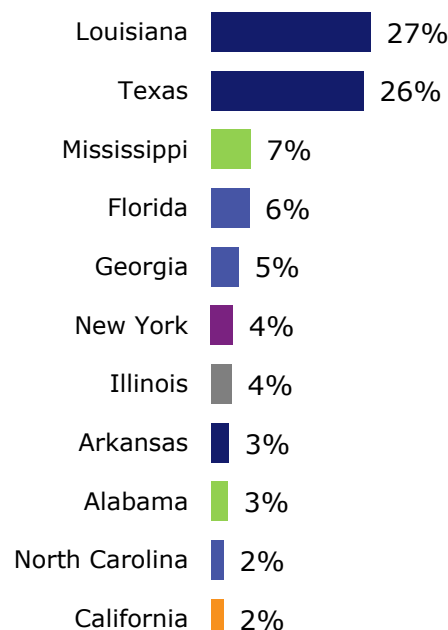
Source of Louisiana Visitors: Census Region

Base: Louisiana Visitors



Source of Louisiana Visitors: Top States

Base: Louisiana Visitors



Panel: State/Region residence of those who visited Louisiana (Total Louisiana Visitors)



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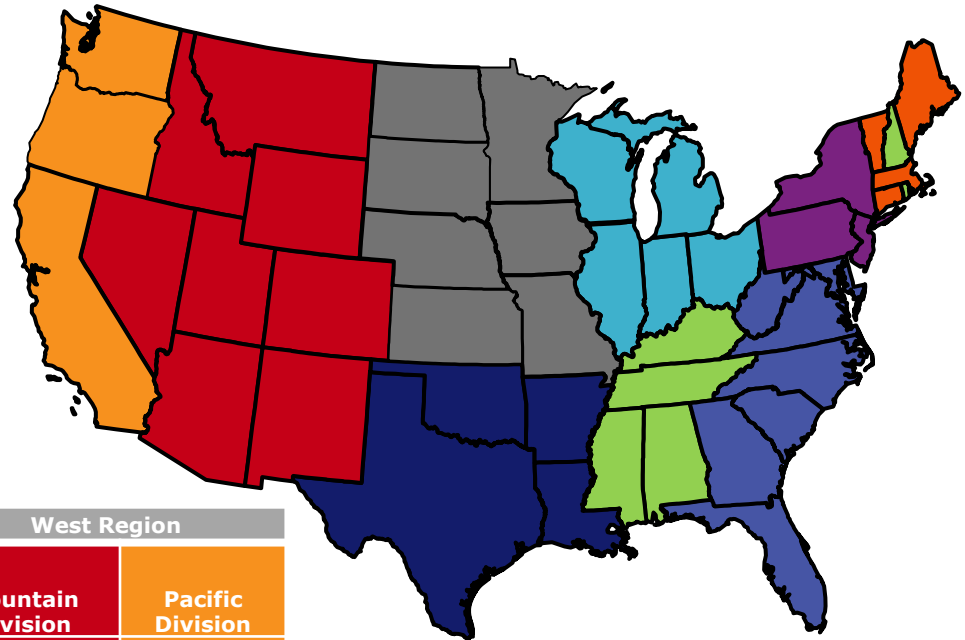
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Geography (Census Region State Composition)

- States within regions: use as a reference for prior slide.

Northeast Region		South Region		
New England Division	Mid Atlantic Division	South Atlantic Division	East South Central Division	West South Central Division
CT	NJ	DL	AL	AR
ME	NY	DC	KY	LA
MA	PA	FL	MS	OK
NH		GA	TN	TX
RI		MD		
VT		NC		
		SC		
		VA		
		WV		

North Central Region		West Region	
East N. Central Division	West N. Central Division	Mountain Division	Pacific Division
IL	IA	AZ	CA
IN	KS	CO	OR
MI	MN	ID	WA
OH	MO	MT	
WI	NE	NV	
	ND	NM	
	SD	UT	
		WY	



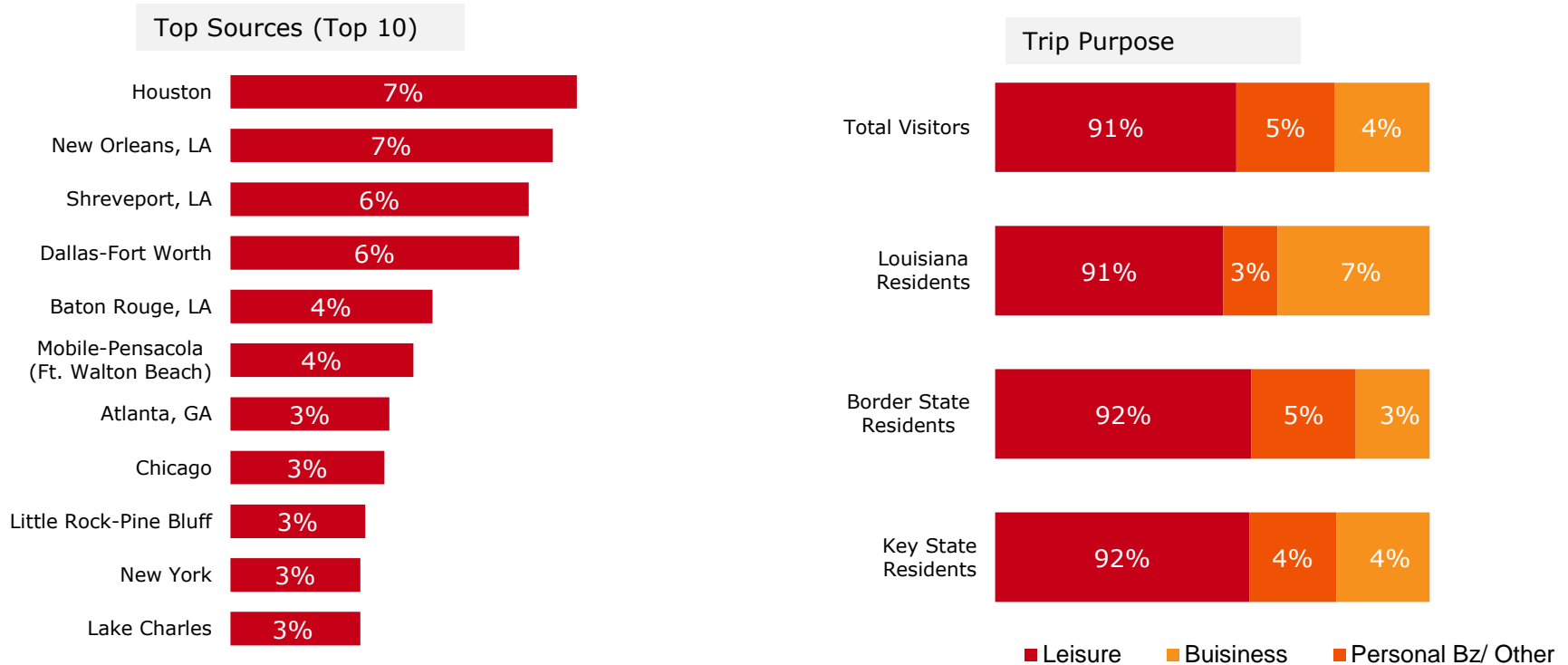
Louisiana visitor trip purpose

Louisiana visitors often live in large, proximal DMAs

- Primarily traveling for pleasure, visitors to Louisiana most often live in Houston, New Orleans, Shreveport, or Dallas/Ft. Worth.

Top Sources by DMA and Purpose of Louisiana Visit by Group

Base: Total Louisiana Visitors



Q13b: Please select the primary purpose of your last trip to Louisiana. Panel: DMA residence of those who visited Louisiana.

4

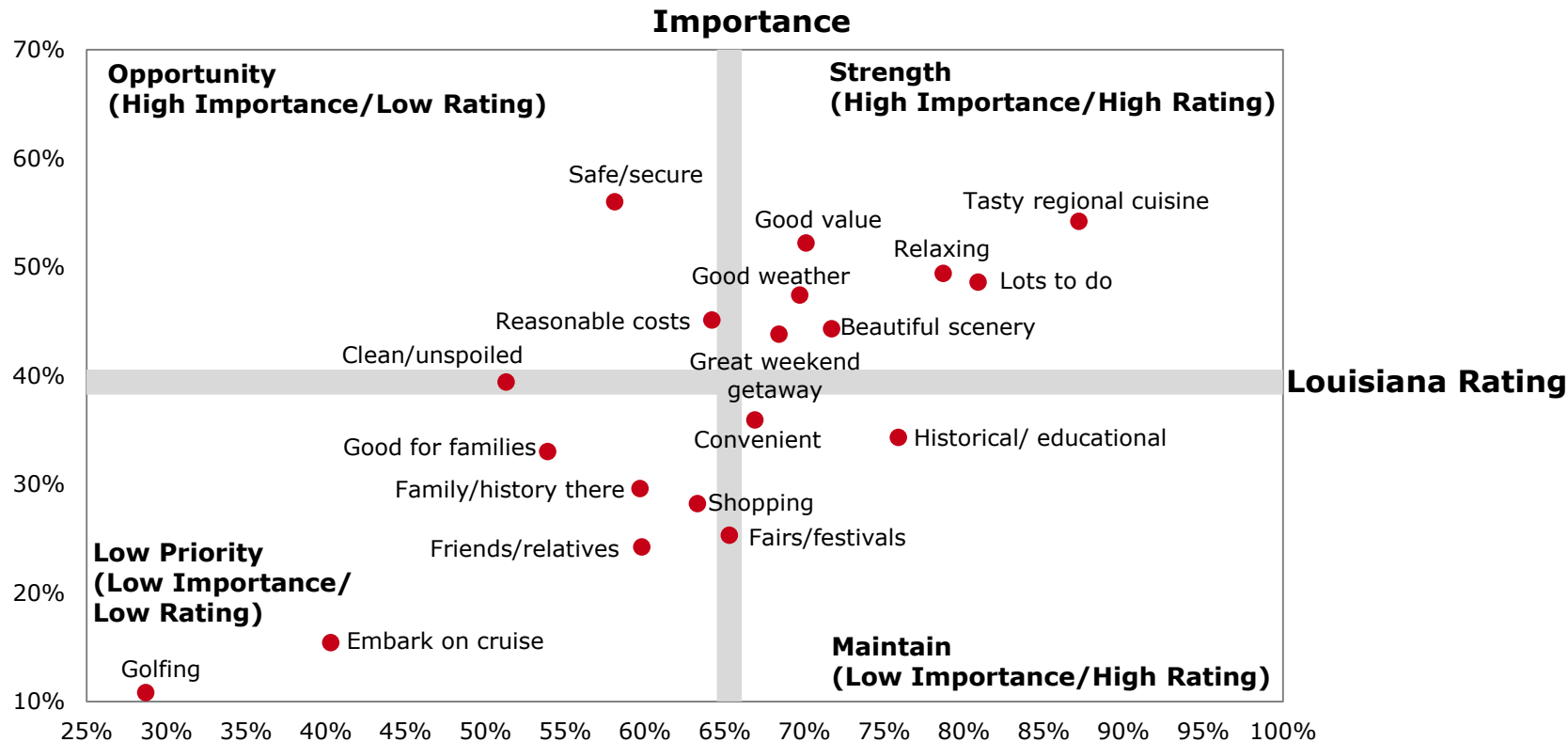
Louisiana's Strengths and Opportunities



Relative size of key segments

Market relevance

- Visitors vote *tasty cuisine* as Louisiana's key strength, with high ratings and high importance; in contrast, they deem *safety and cleanliness* as areas to improve.
- Only a few *golf* in or *cruise* from Louisiana.



Q23: Using a scale of 1 to 10 (10=extremely important), please rate the importance of each of the following attributes when selecting a destination.

Q24: For each of the attributes mentioned below, please rate how well Louisiana suits you.

5

Trip Characteristics and Satisfaction

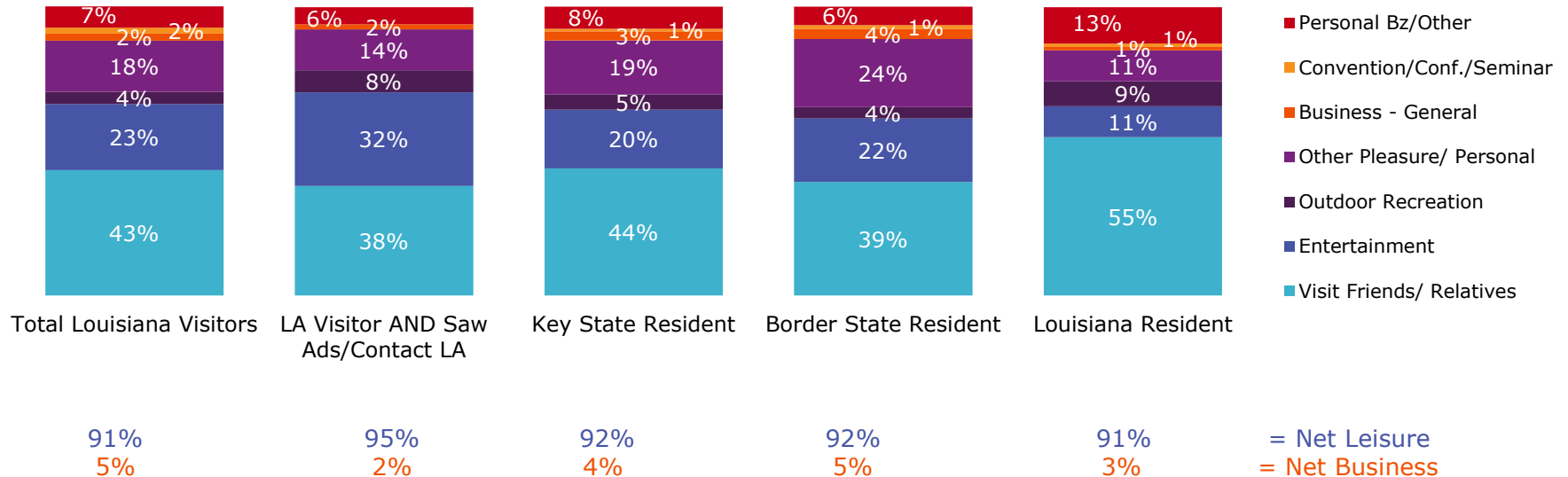


Trip purpose by visitor source/awareness

Visitors usually come to Louisiana for fun

- Nearly all visit for pleasure, with locals (in-state residents) more likely visiting family and friends.

Primary Purpose of Trip



* Caution: Very small base size n<20

Q13b. Abridged: Please select the primary purpose of your last trip to Louisiana.



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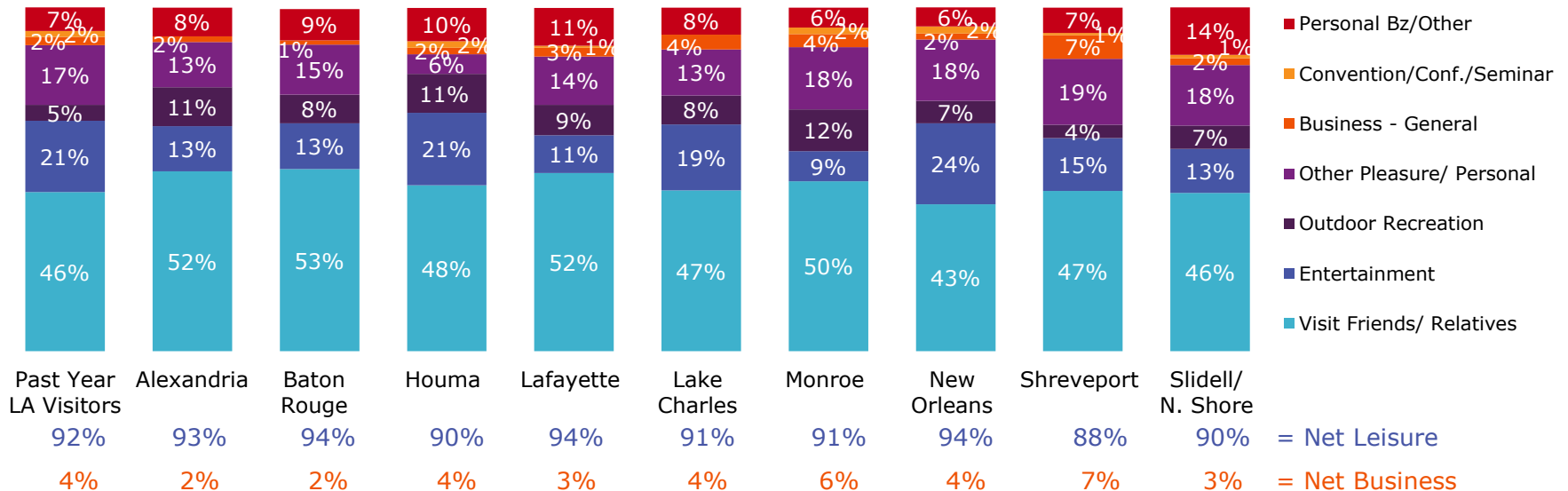
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Trip purpose by destination

Visitors usually come to Louisiana for fun

- Leisure travel dominates every destination, particularly friends and relatives; New Orleans attracts a larger share of visitors coming for entertainment.

Primary Purpose of Past Year Louisiana Trip



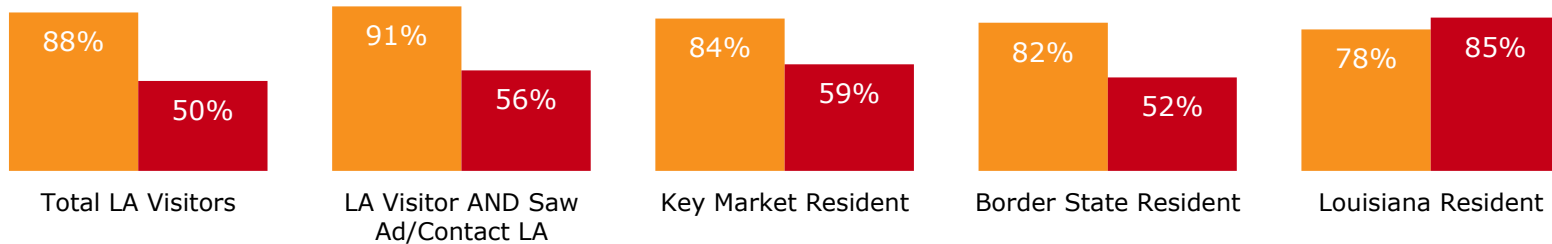
Q13b. Abridged: Please select the primary purpose of your last trip to Louisiana.

Overnight stays

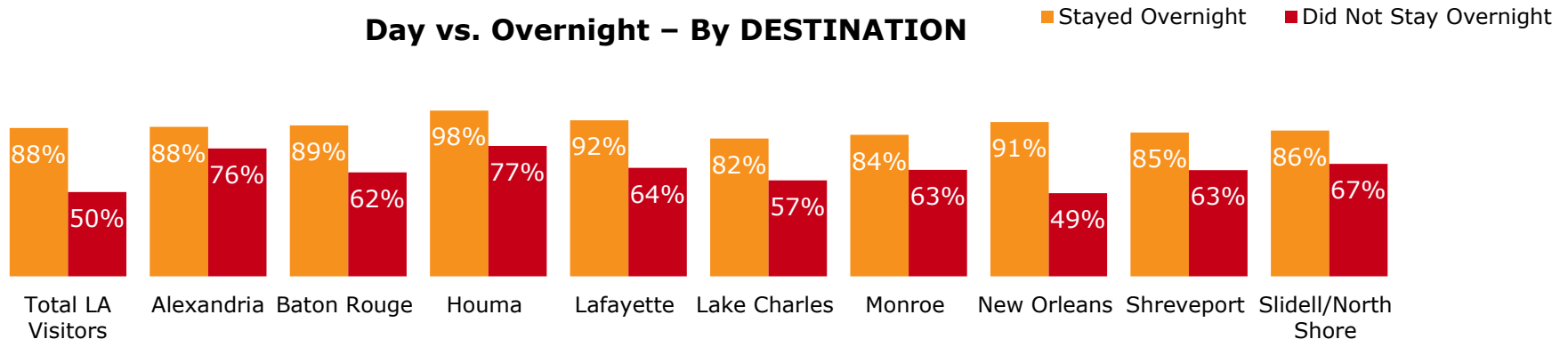
Most visitors spend at least one night, unless they live in-state

- All Louisiana destinations host visitors who come for the day on some trips and spend the night on others. Since New Orleans has a higher proportion of more distant visitors, it logically hosts fewer day-trippers.

Day vs. Overnight – By SEGMENT



Day vs. Overnight – By DESTINATION

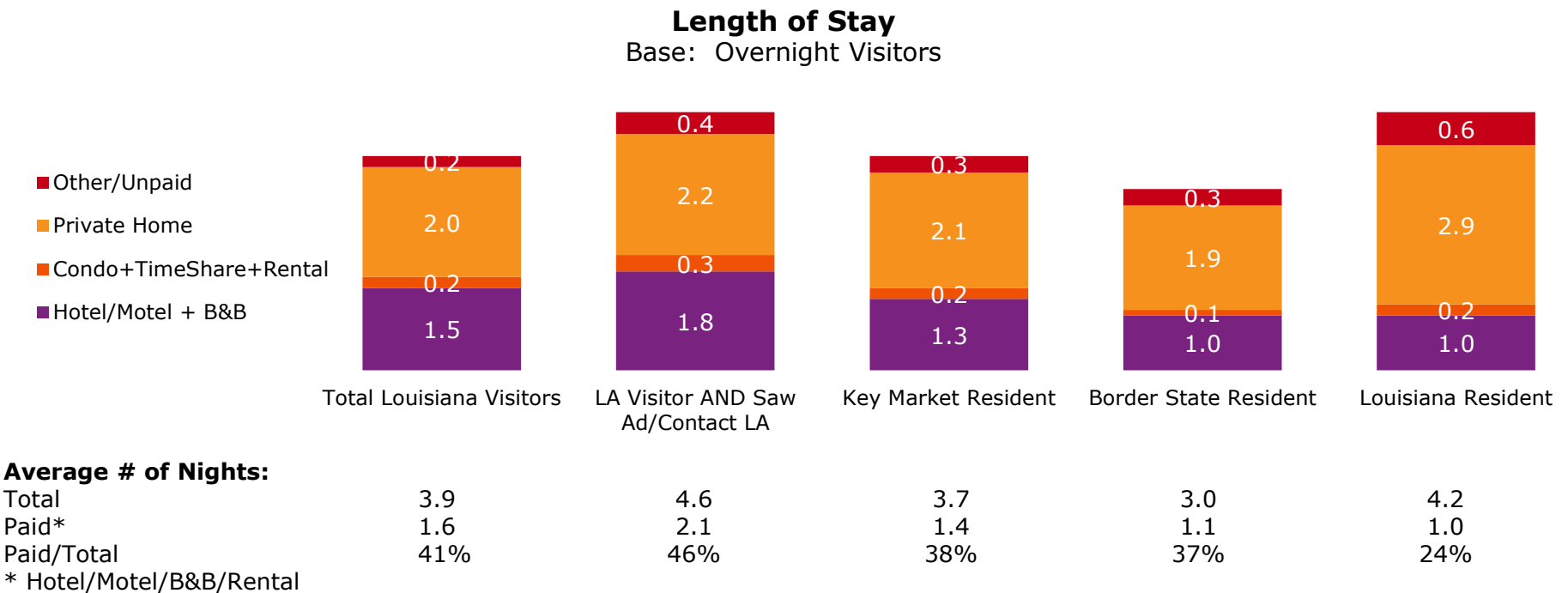


Q6. How many leisure trips, both day and overnight visits, have you made to Louisiana in the past 12 months?

Accommodations by segment

The majority stay with friends/relatives

- The largest share of Louisiana visitors come to see friends/family and many stay with them rather than in other accommodations
- Louisiana residents spend relatively few of their overnights (24%) in paid accommodations.

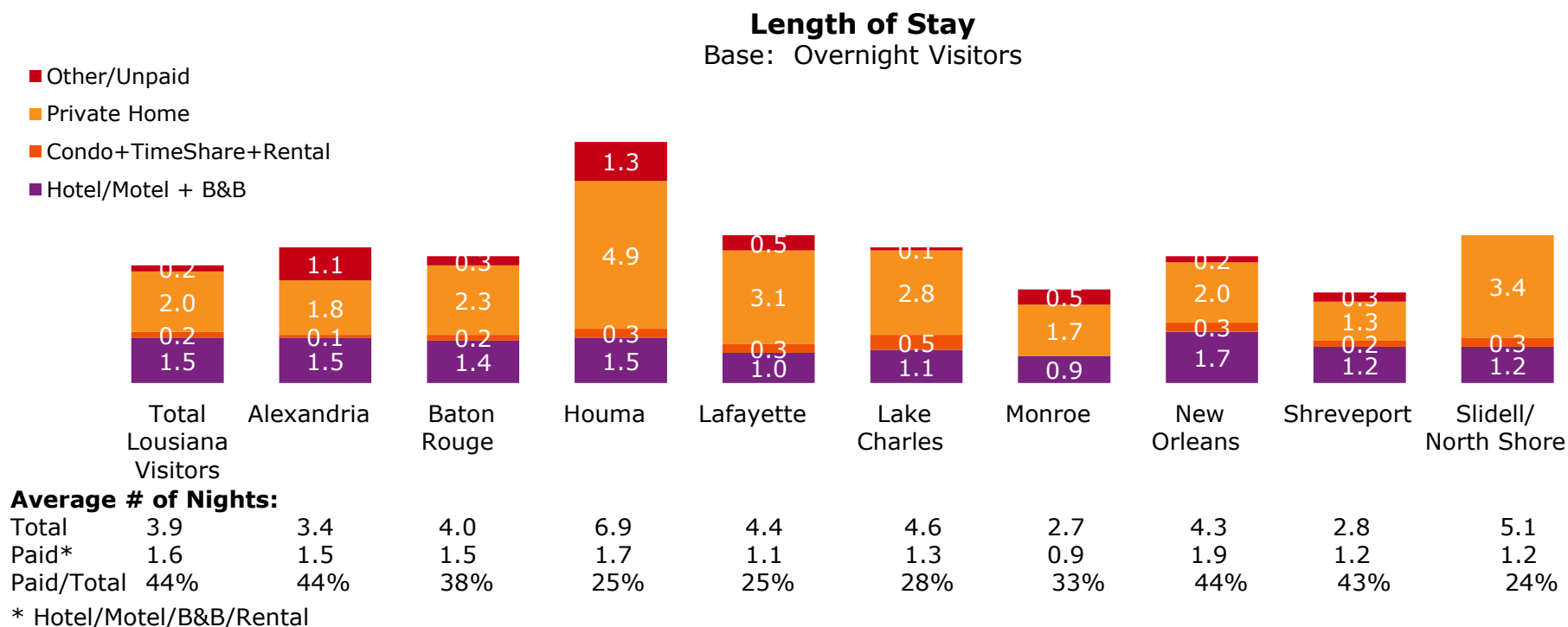


Q17. Please specify the number of nights stayed at each of the listed accommodations on your last trip to Louisiana.

Accommodations by destination

Visitors stay about four days on their Louisiana trips

- More New Orleans, Alexandria, and Shreveport visitors pay for accommodations than those traveling to other Louisiana destinations.



Q17. Please specify the number of nights stayed at each of the listed accommodations on your last trip to Louisiana.



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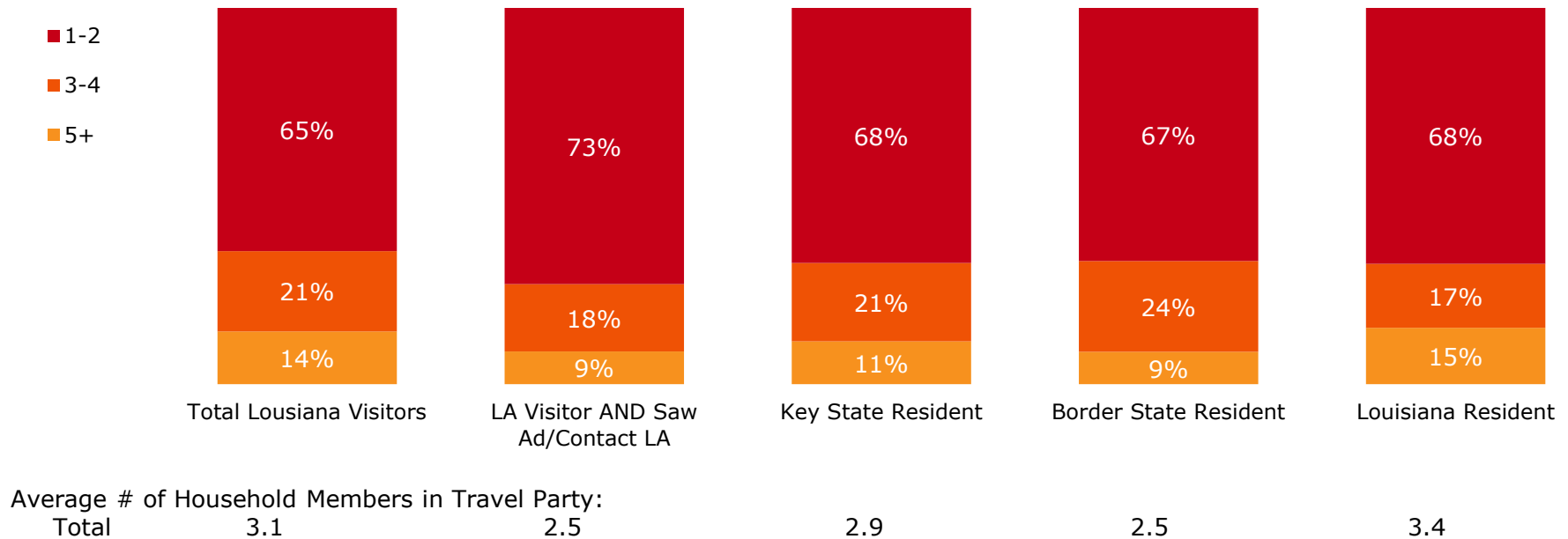
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Travel companions by source

Most visitors arrive alone or with one other

Number of Household Members in Travel Party (Including Self)



Q21. On you last vacation-related trip to Louisiana, including yourself, how many people were in your travel party?



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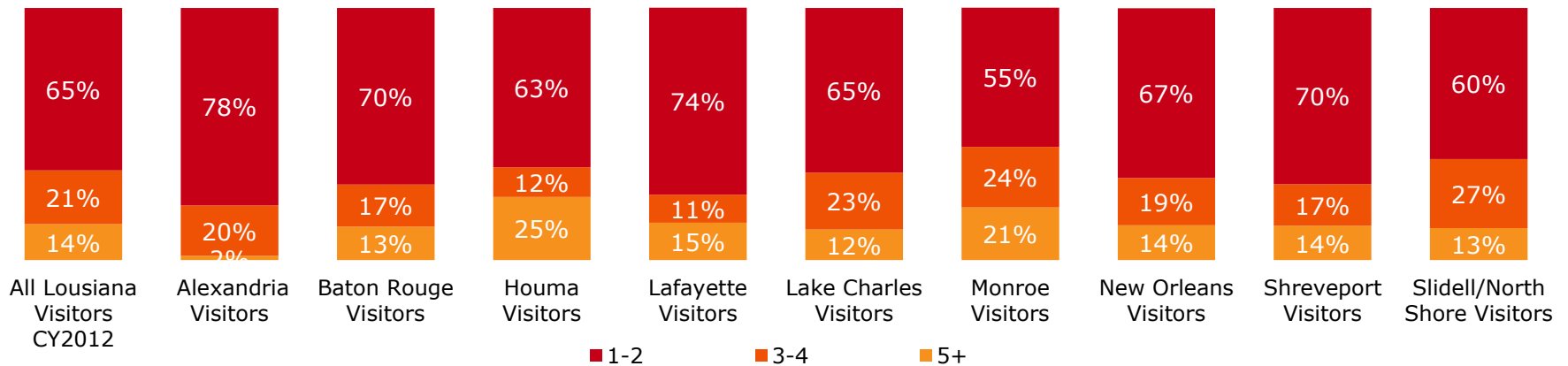
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Travel companions by destination

New Orleans draws the fewest families with children

- One- and two-person travel parties dominate, although Monroe (home of Duck Dynasty's Robertson family) visitors more often come in larger groups.

Number of Household Members in Travel Party (Including Self)



Average # of Household Members in Travel Party:
Total 3.1 2.0 2.7 3.4 2.7 3.5 3.1 2.8 3.1 2.8

Q21. On your last vacation-related trip to Louisiana, including yourself, how many people were in your travel party?



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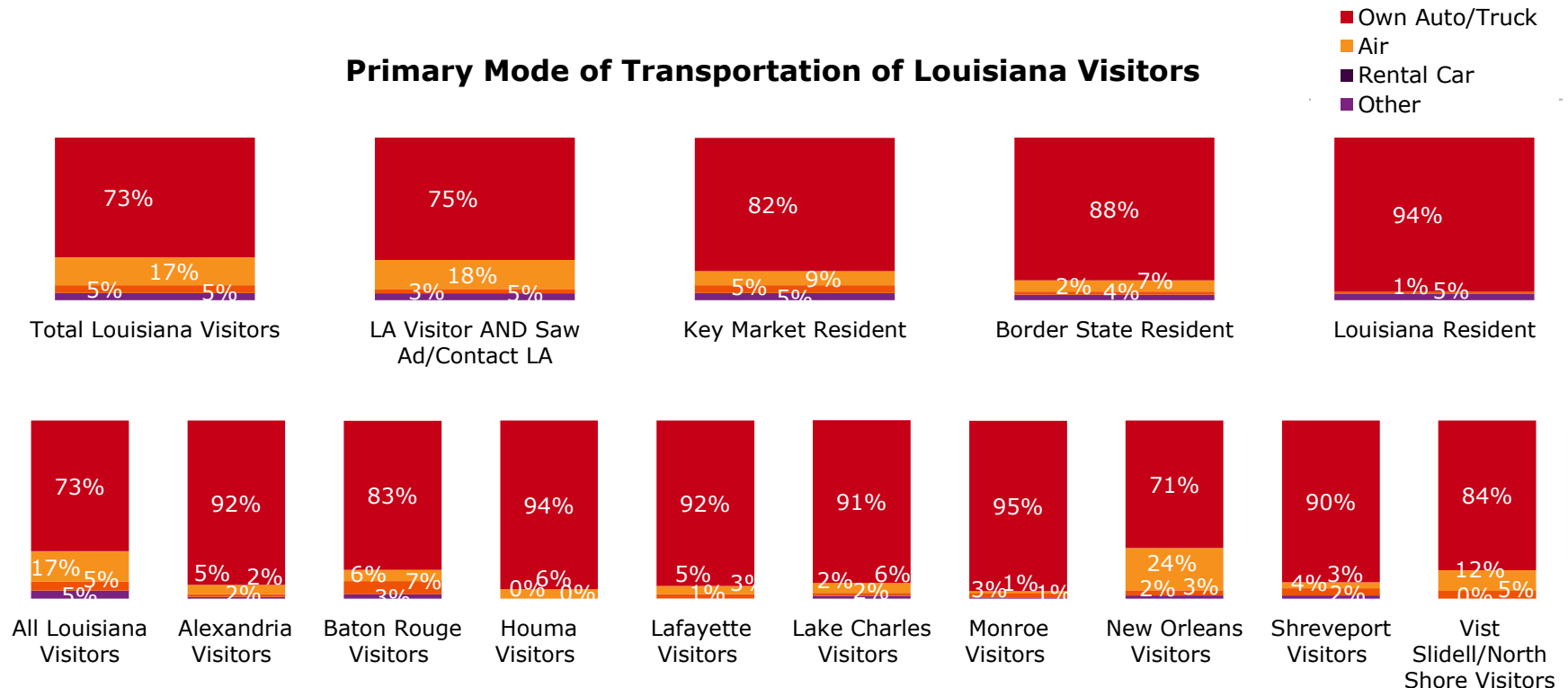
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Primary mode of transportation

Most travelers drive to their destination

- Most Louisiana visitors drive, but air transportation climbs with increasing distance from Louisiana.

Primary Mode of Transportation of Louisiana Visitors



Q14. Please select the primary mode of transportation used on your last trip to Louisiana.



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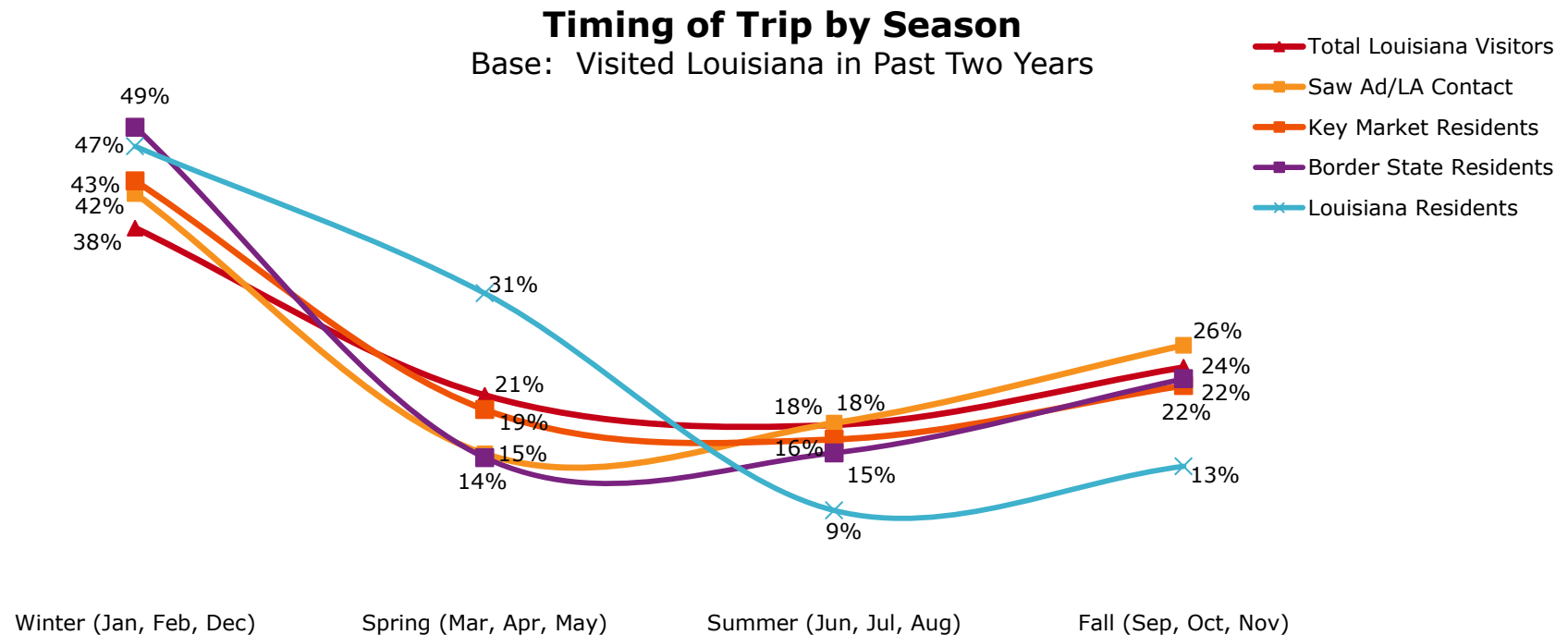
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Trip timing

Nationally, most travel occurs in Summer, but not for Louisiana

Louisiana attracts visitors "off-season":

- Overall, February and December lead other months
- However, Louisiana residents most often visit in February or March; Border state residents add January to the February/December mix.



Q12. What was the month of your last visit to Louisiana?



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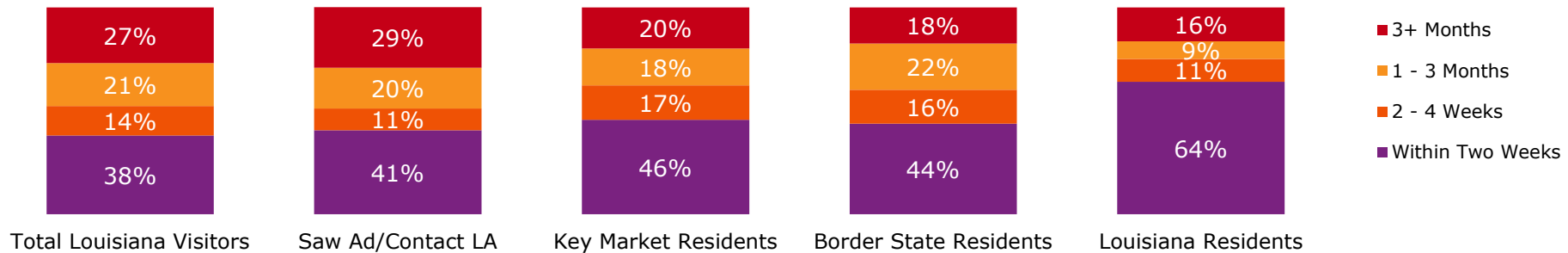
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Trip planning – timing by segment

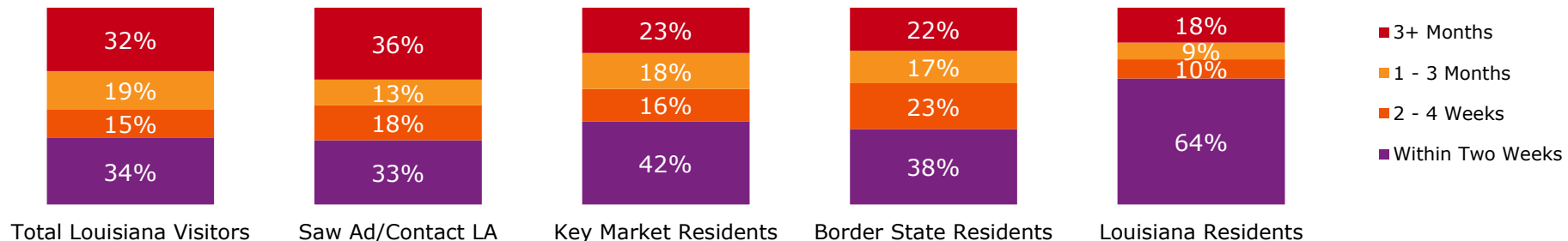
Logical patterns occur for trip planning

- With a larger share of day-trippers, in-state visitors consider and decide to take relatively spontaneous trips.

Time Decided On Trip Before Visit to Louisiana



Time Considered Trip Before Visit to Louisiana



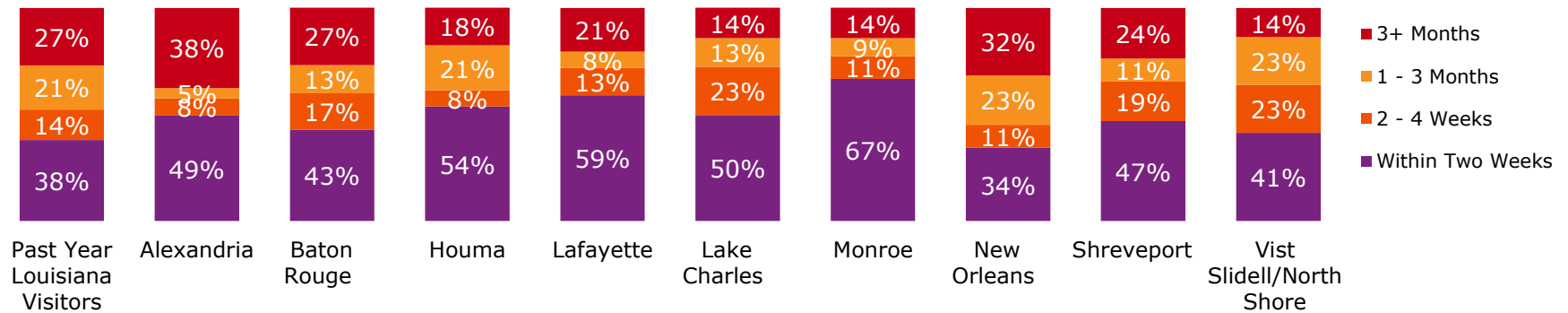
Q7. How far in advance did you consider/decide to visit Louisiana?

Trip planning – timing by destination

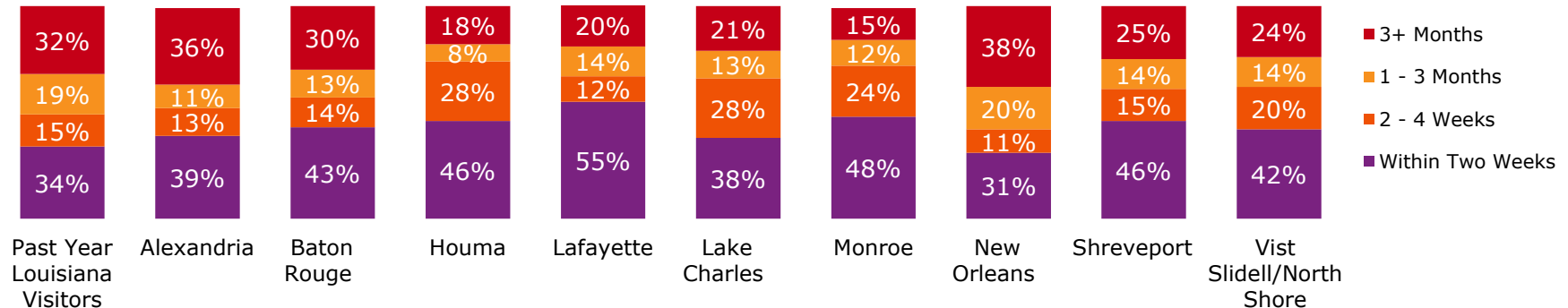
Trip planning relates to distance from primary source markets

- Consistent with the largest share of visitors who live outside Louisiana (68%), those traveling to New Orleans take longer to plan and decide on a trip
- Over half decide to travel to other LA destinations more spontaneously (57%+ within two weeks).

Time Decided On Trip Before Visit to Louisiana



Time Considered Trip Before Visit to Louisiana



Q7. How far in advance did you consider/decide to visit Louisiana?

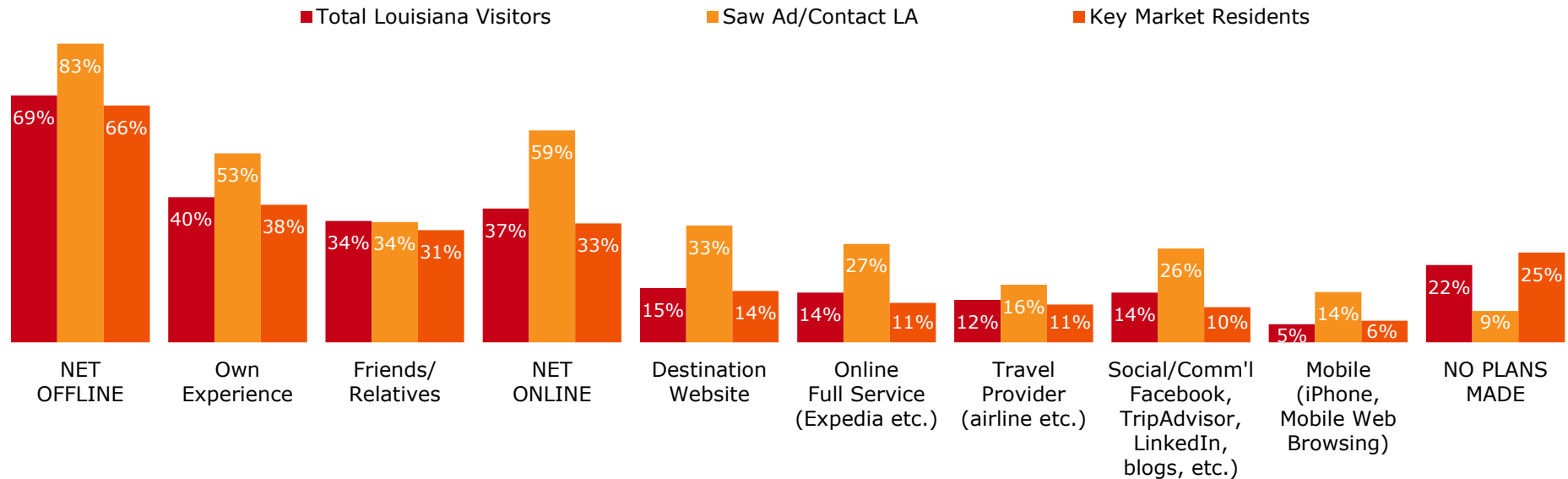
Trip planning – information sources

Louisiana visitors use the same sources as total US travelers

- Louisiana trip planners primarily rely on their past experience and word of mouth as key sources of information, but those who recall a Louisiana ad/use its website/contact Louisiana Tourism more often make plans and take advantage of all types of information.

Information Sources to Plan a Trip

Ranked by Louisiana Visitors 2012 (5%+)



Q8. What sources did you use to plan your last trip to Louisiana?



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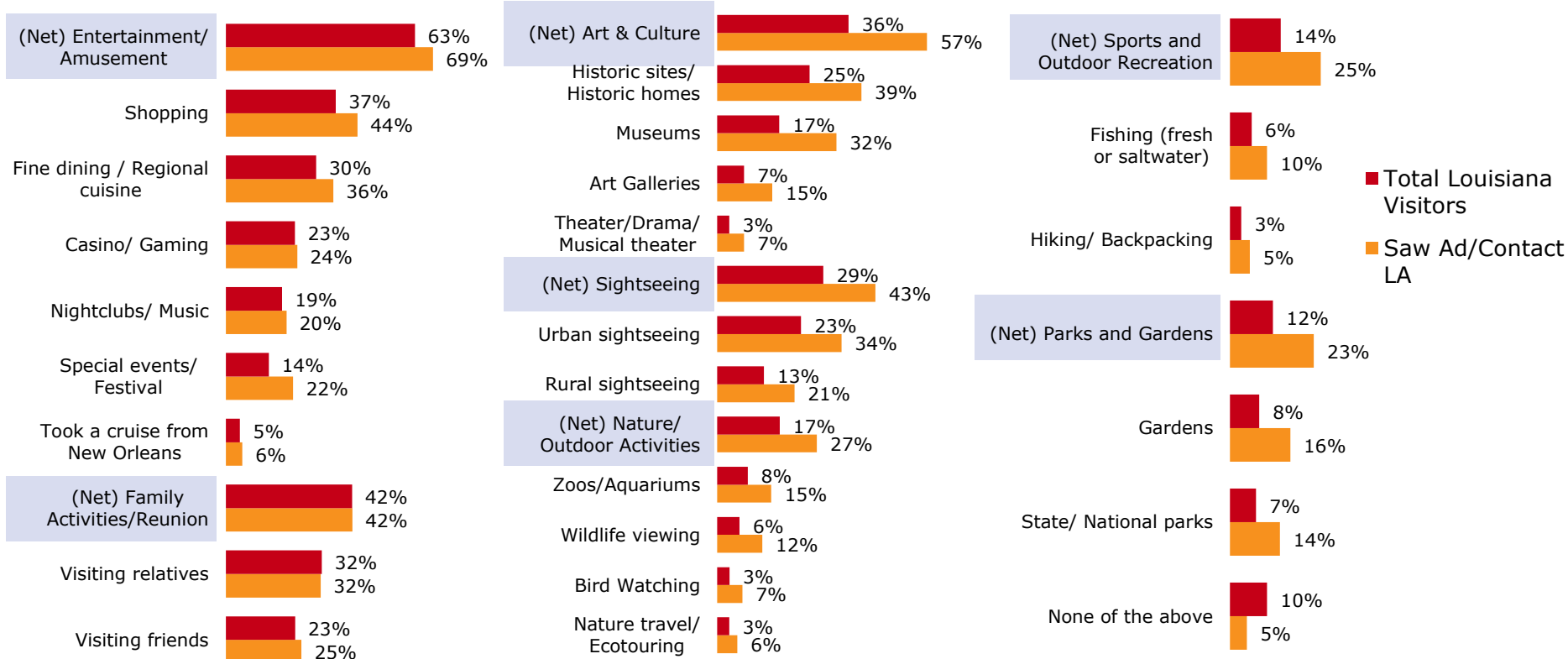
Trip characteristics: overall vacation activities

Louisiana visitors come to visit, shop, eat, gamble, and sightsee

- Further, those who recognize ads and use Louisiana Travel information make good use of the resources – adding more culture-oriented and nature-oriented (both animal and plant) activities to their trips.

Activities Participated/Attractions Visited

% Participated/Visited – Ranked by Louisiana Visitors (Activities 3%+ of Total Louisiana Visitors)



Q18. Please check all of the activities you did/attractions visited on your last Louisiana trip.

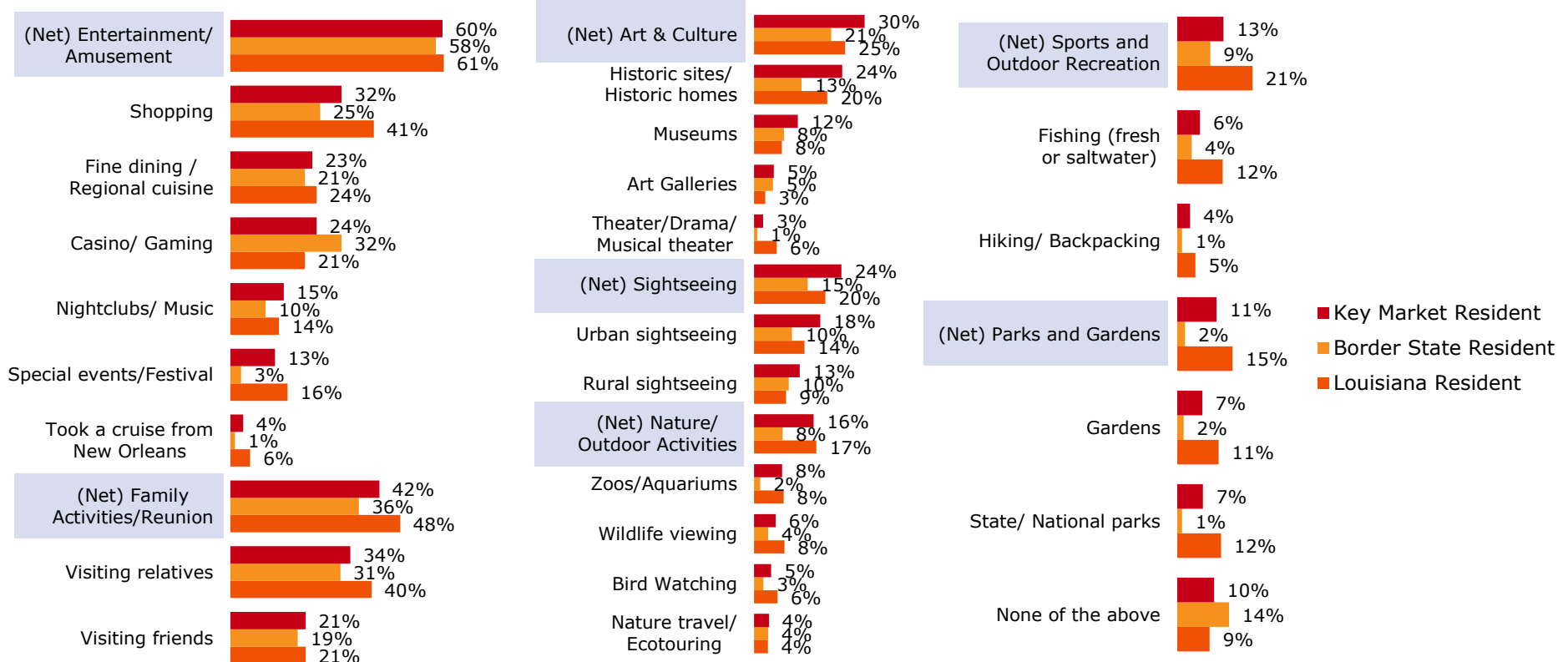
Trip characteristics: vacation activities by residence

In-state residents most often visit relatives

- Border state residents tend to choose somewhat different activities than other visitors, placing greater emphasis on gaming and often lagging on other choices.

Activities Participated/Attractions Visited

% Participated/Visited – Ranked by Louisiana Visitors (Activities 3%+ of Total Louisiana Visitors not shown)



Q18. Please check all of the activities you did/attractions visited on your last Louisiana trip.

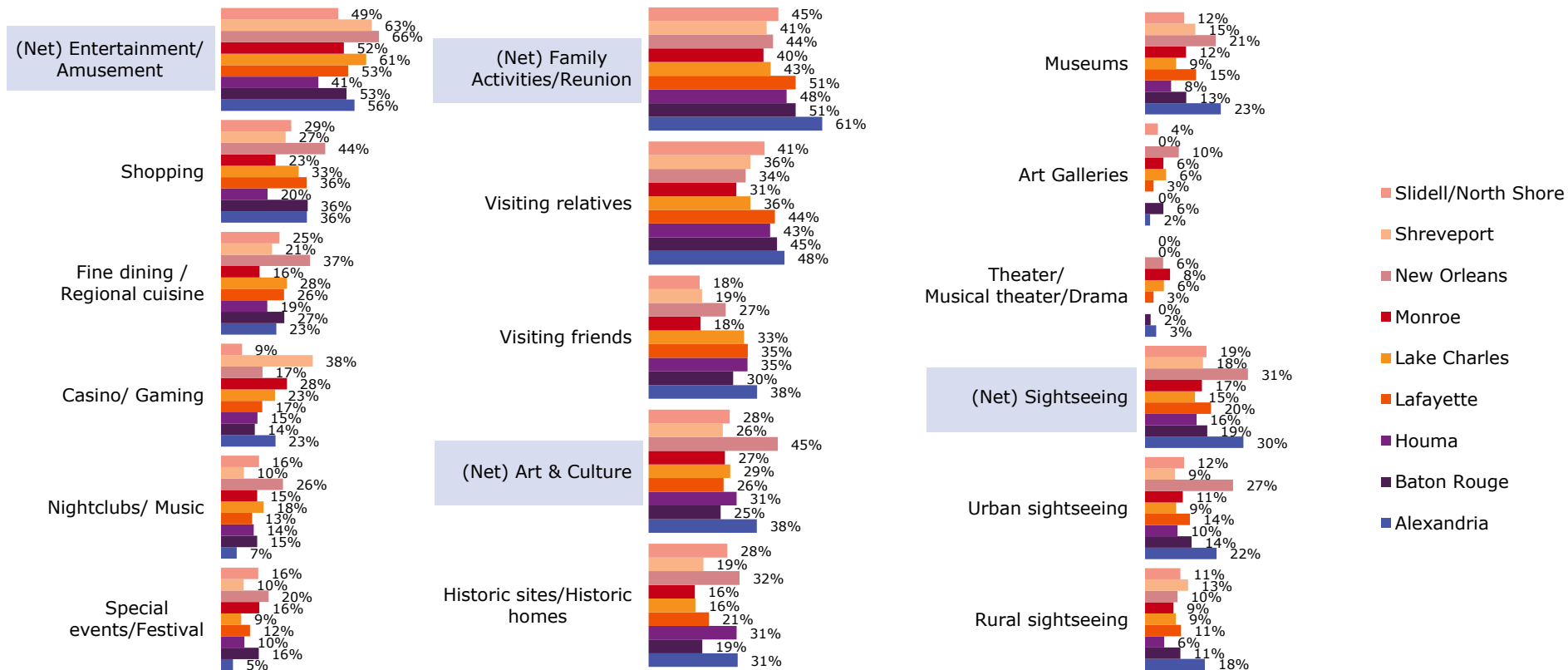
Trip characteristics: vacation activities by destination

Activities vary widely by destination

- Most distinctive are New Orleans and Alexandria, which lead history, museums, and urban sightseeing; New Orleans also adds nightlife, dining, and special events; Shreveport lures casino/gaming visitors; and Alexandria excels on outdoor recreation and parks/gardens.

Activities Participated/Attractions Visited

% Participated/Visited – Ranked by Louisiana Visitors (Activities 3%+ of Total Louisiana Visitors not shown)



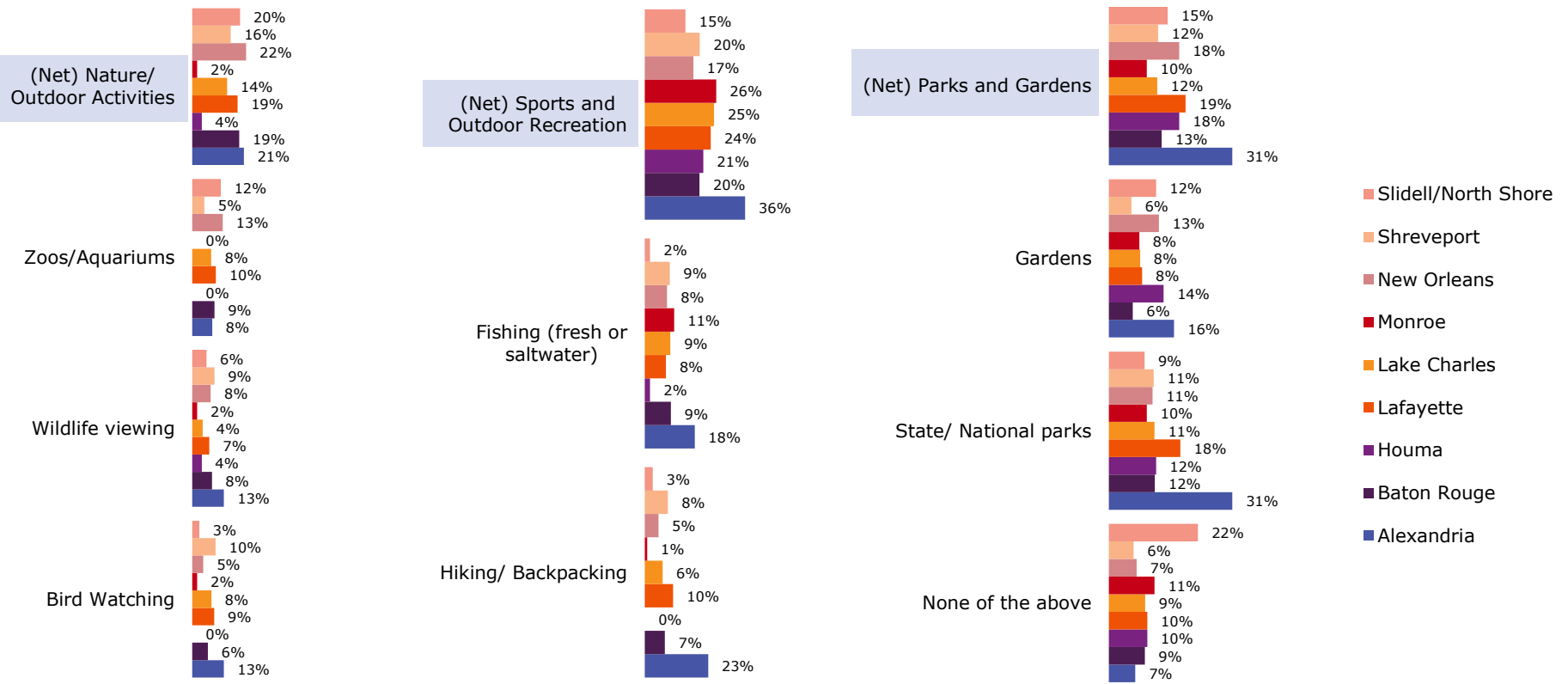
Q18. Please check all of the activities you did/attractions visited on your last Louisiana trip.

Trip characteristics: vacation activities by destination

Activities vary widely by destination

Activities Participated/Attractions Visited

% Participated/Visited – Ranked by Louisiana Visitors (Activities 3%+ of Total Louisiana Visitors not shown)



Q18. Please check all of the activities you did/attractions visited on your last Louisiana trip.

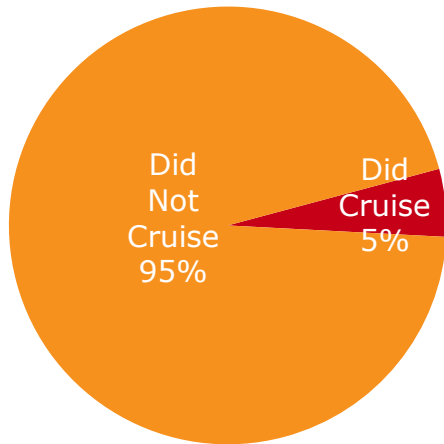
Trip characteristics: New Orleans cruise visitors

- A few New Orleans visitors embark on a cruise there and almost half of them spend at least a day or two exploring the city.

Cruisers Spend a Little Time in New Orleans

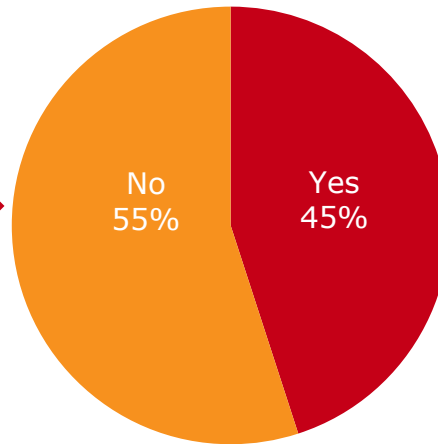
New Orleans Cruise Visitors

Base: Total Visitors (522)



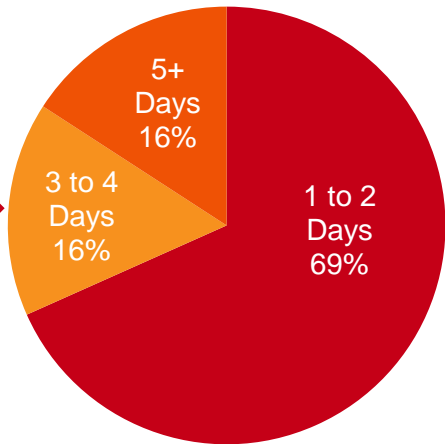
Extra Days in Louisiana

Base: New Orleans Cruisers (24)



How Many?

Base: Spent Extra Days (11)



Average # Days:

Q18. Please check all of the activities you did/attractions visited on your last Louisiana trip.

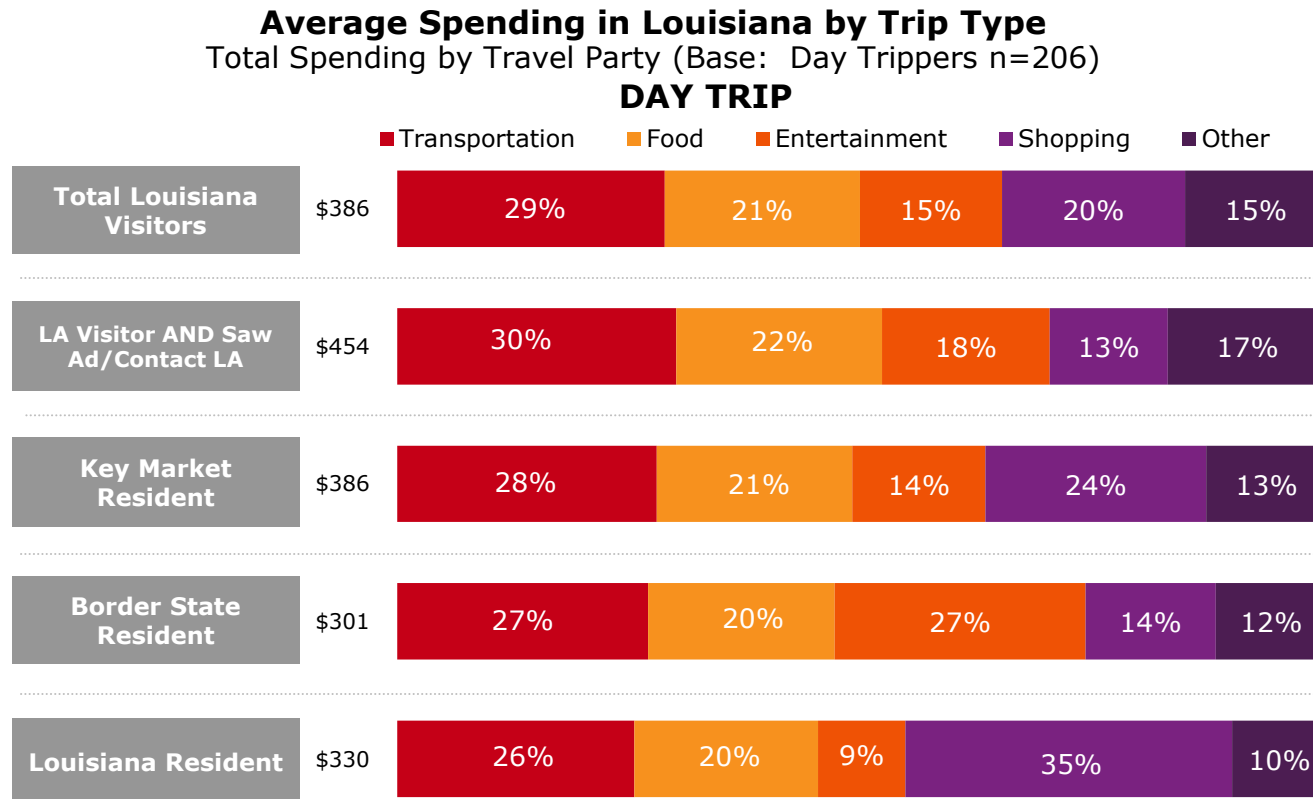
Q19. Did you add any extra days before or after the cruise to spend more time in Louisiana?

Q20. Considering only the days spent for leisure purposes during this last trip, how many total days did you spend visiting Louisiana?

Day-trip expenditures

Spending choices vary by residence

- Louisiana residents spend the most for shopping
- Border residents take advantage of Louisiana's entertainment options (including gaming).



Q15. Please estimate the dollars your travel party spent for each category on your last day trip to Louisiana.



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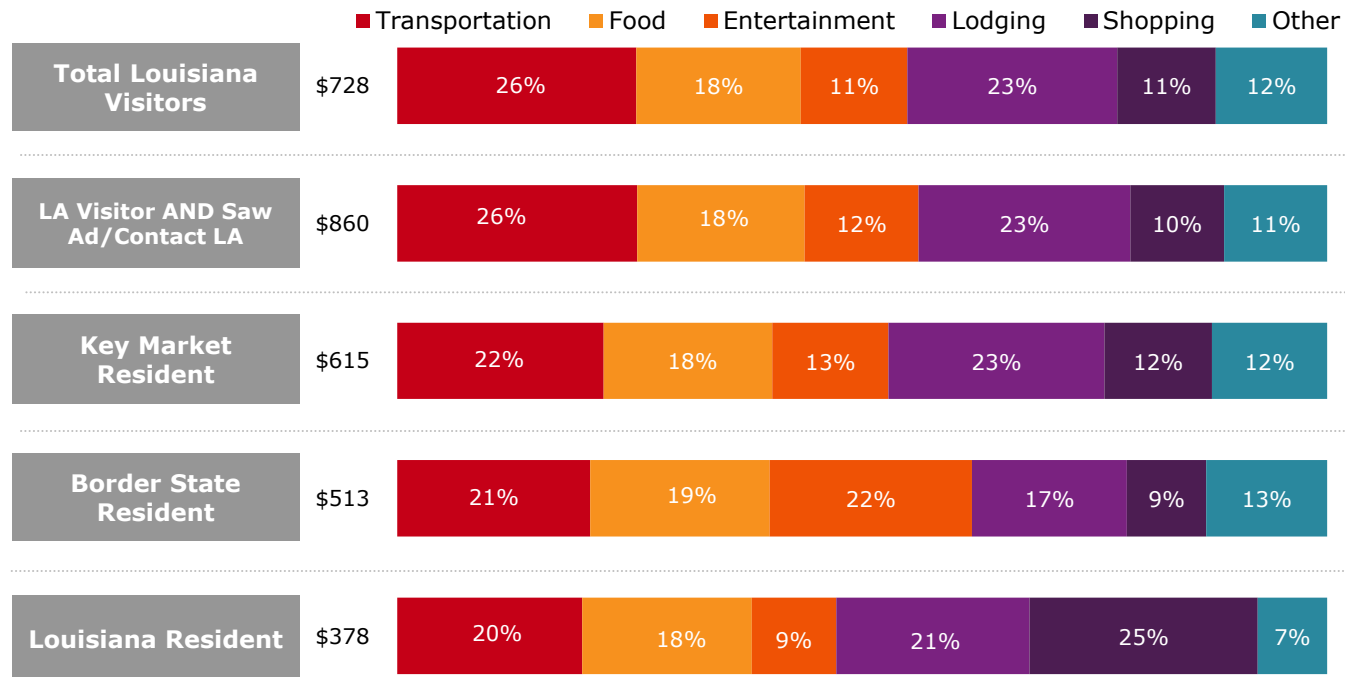
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Trip expenditures by purpose

Visitor spending grows with distance from Louisiana

- Overnight visitors spend almost twice as much as day-trippers (\$728 vs. \$386)
- Shopping plays a larger role for in-state residents than for others.

Average Spending in Louisiana by Trip Type
Total Spending by Travel Party (Base: Overnights n=367)
OVERNIGHT TRIP



Q16. Please estimate the dollars your travel party spent for each category on your last overnight trip to Louisiana.

Trip expenditures by destination

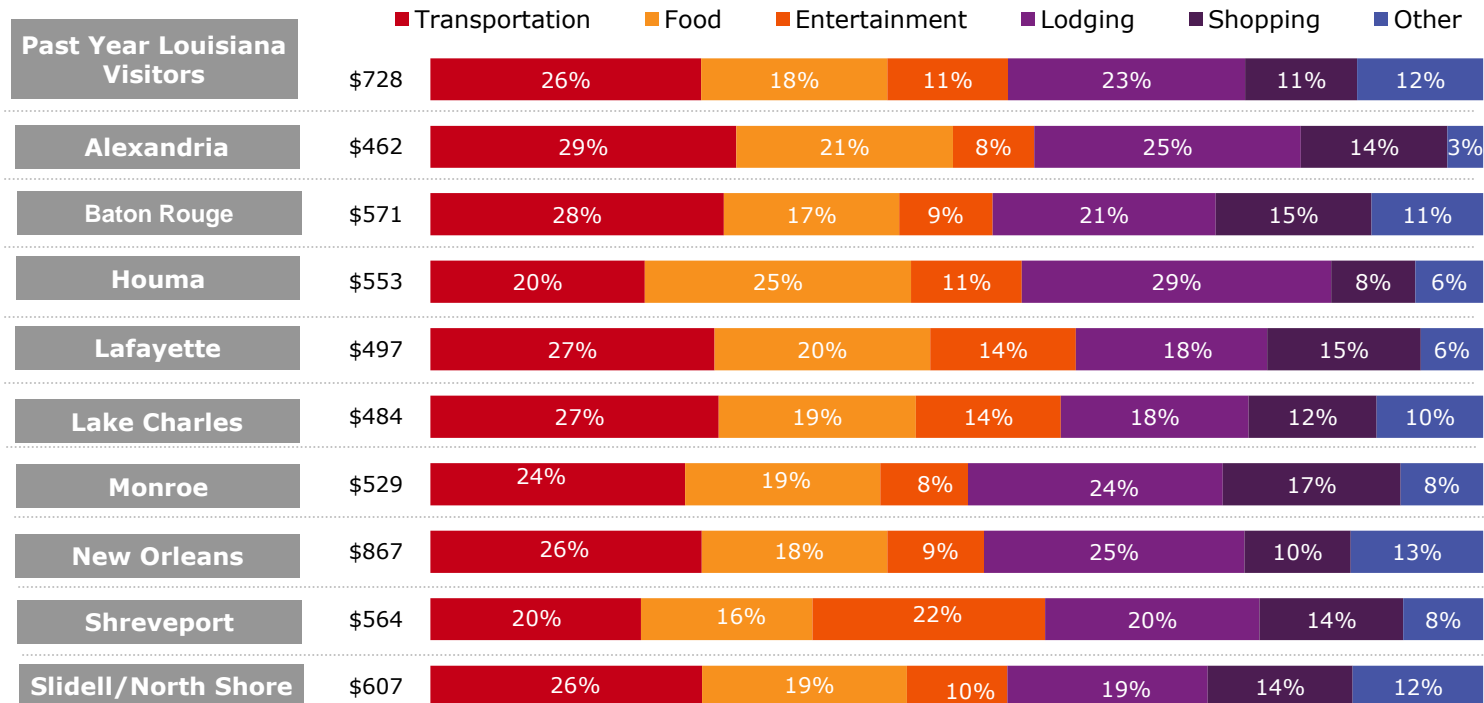
New Orleans visitors spend more than others

- New Orleans visitors, who travel farther and stay longer than average, spend the most
- Otherwise, visitors generally spend between \$450 and \$600.

Average Spending in Louisiana by Destination

Total Spending by Travel Party (Base: Overnighters n=367)

OVERNIGHT TRIP



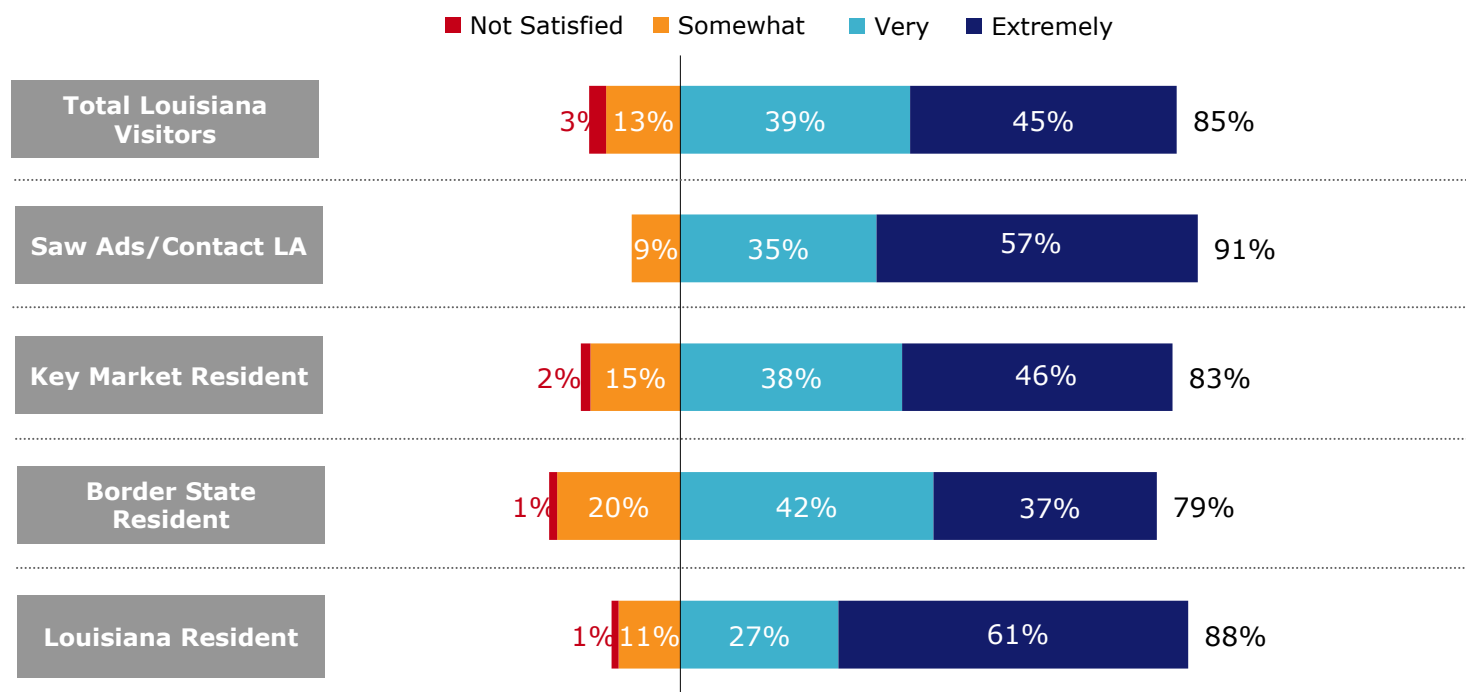
Q16. Please estimate the dollars your travel party spent for each category on your last overnight trip to Louisiana.

Satisfaction with Louisiana by residence

Satisfaction is strong regardless of residence

- Louisiana residents and visitors who recognized ads or contacted Louisiana Travel directly/ via the website endorse Louisiana most fervently (extremely satisfied).

Satisfaction with Louisiana Visit
By Residence

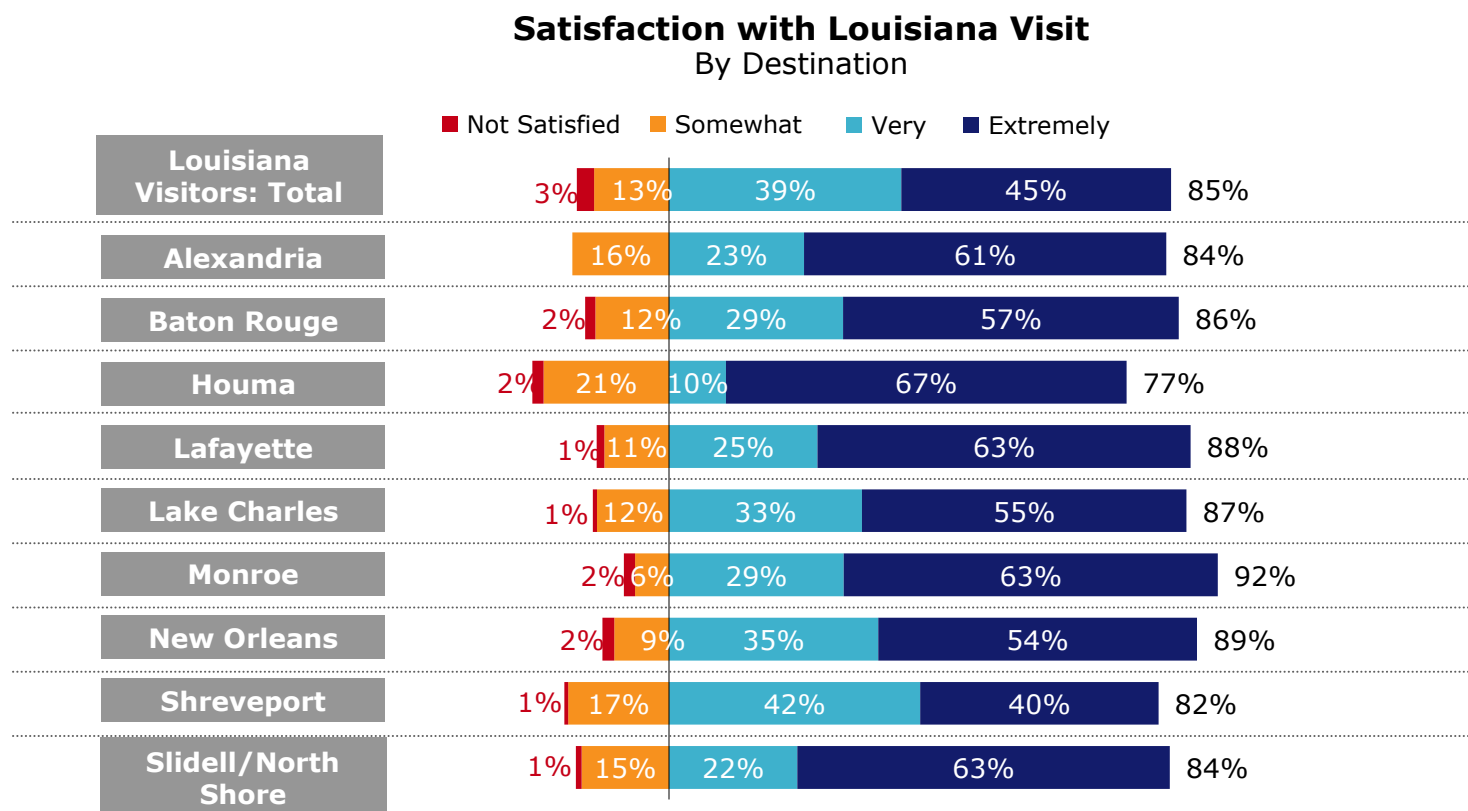


*Note: Not Satisfied includes Not At All and Not Very Satisfied
Q22: Overall, how pleased were you with your last visit to Louisiana?

Satisfaction with Louisiana by destination

Satisfaction varies somewhat by destination

- Most visitors go home happy; Shreveport (perhaps gaming losses?) and Houma trail other destinations.

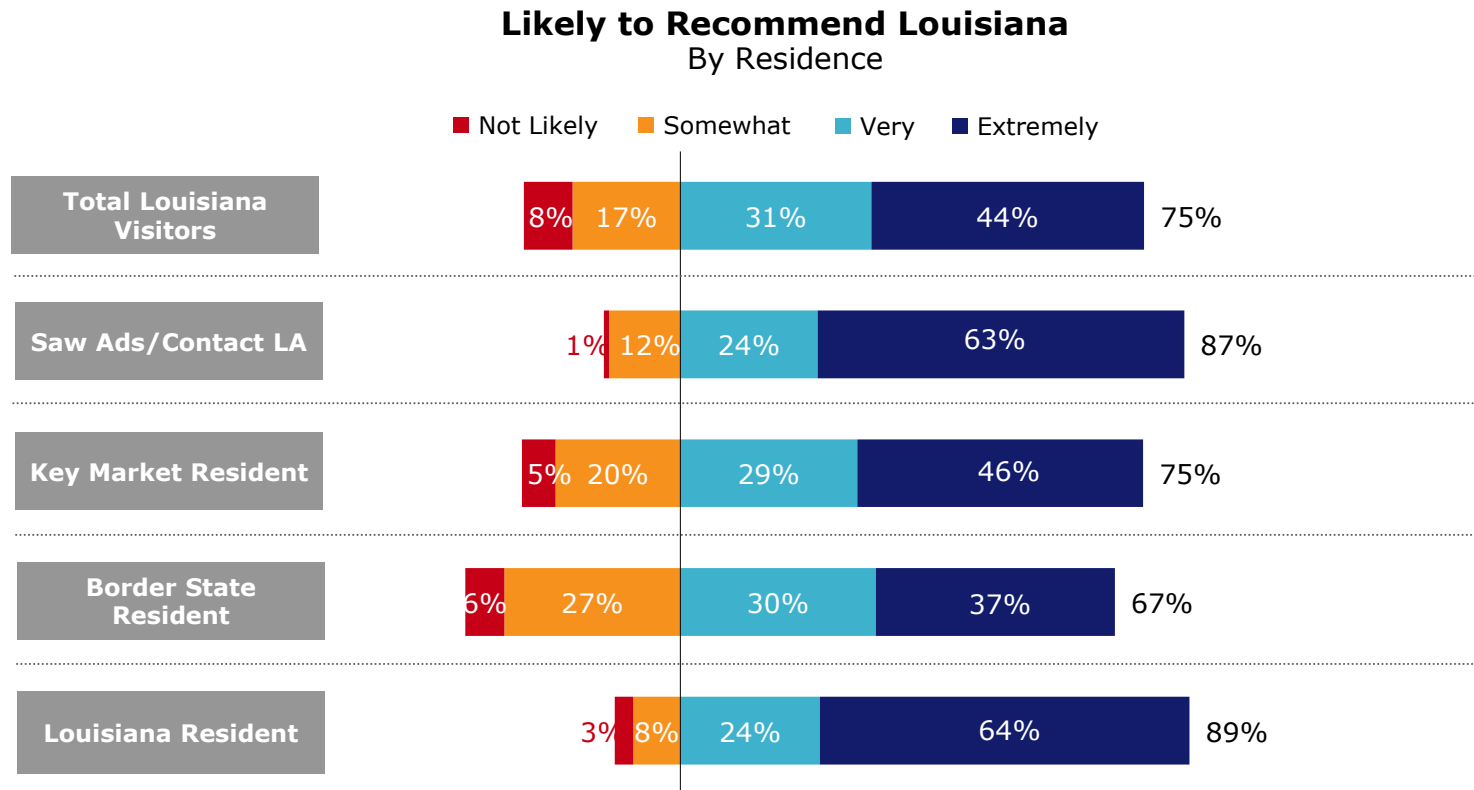


*Note: Not Satisfied includes Not At All and Not Very Satisfied
Q22: Overall, how pleased were you with your last visit to Louisiana?

Likely to recommend Louisiana

Likelihood is strong regardless of residence

- Similar to satisfaction, Louisiana residents and visitors who recognized ads or contacted Louisiana Travel directly/ via the website would most likely support Louisiana by word-of-mouth.



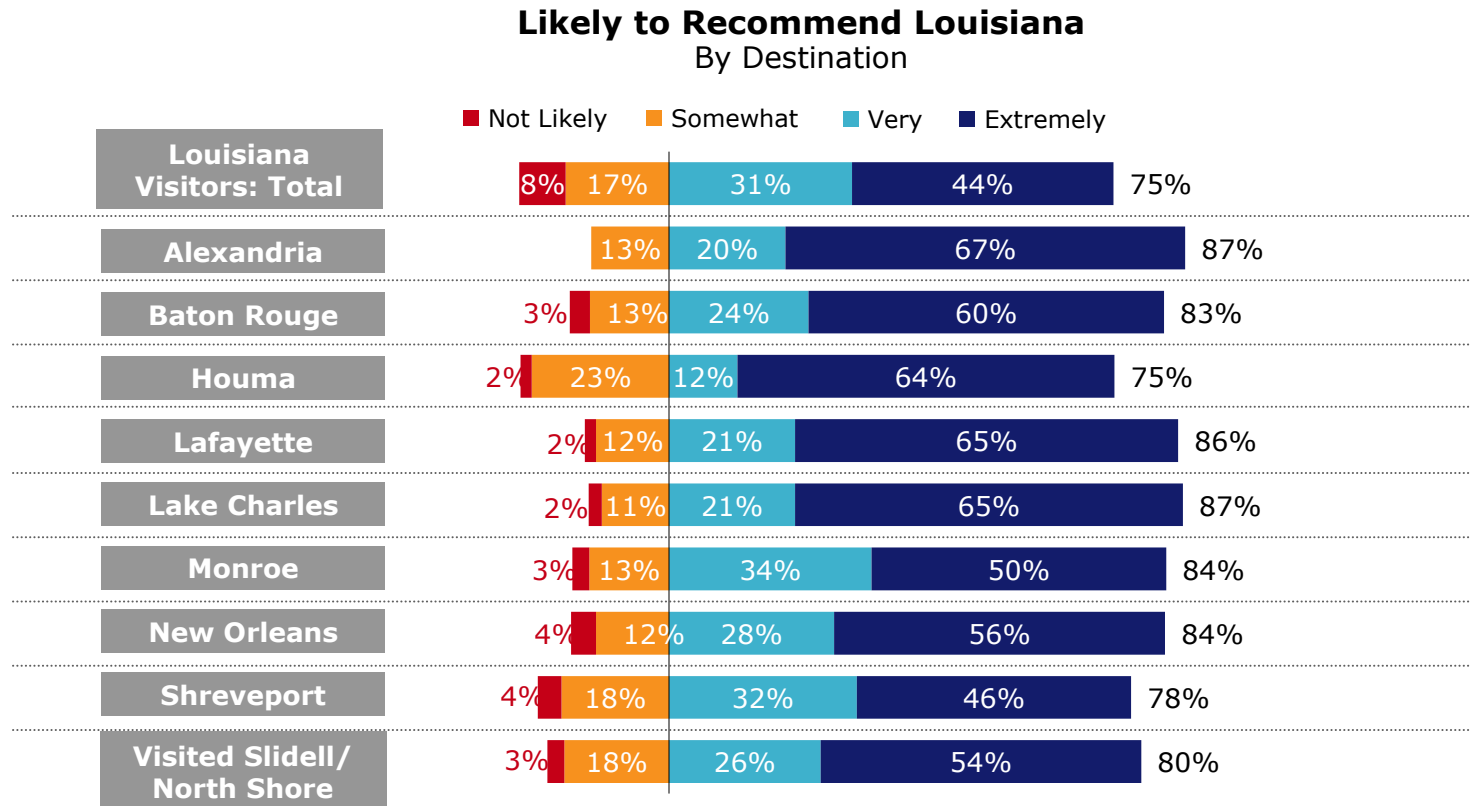
*Note: Not Likely includes Not At All and Not Very Likely

Q25: How likely are you to recommend a leisure trip to Louisiana to a friend or family member?

Likely to recommend Louisiana by destination

Likelihood varies somewhat by area visited

- Most praise the destination they visit; even Shreveport, Houma, and Slidell/North Shore have very few unwilling to recommend it.



*Note: Not Likely includes Not At All and Not Very Likely

Q25: How likely are you to recommend a leisure trip to Louisiana to a friend or family member?

6

Competitive States



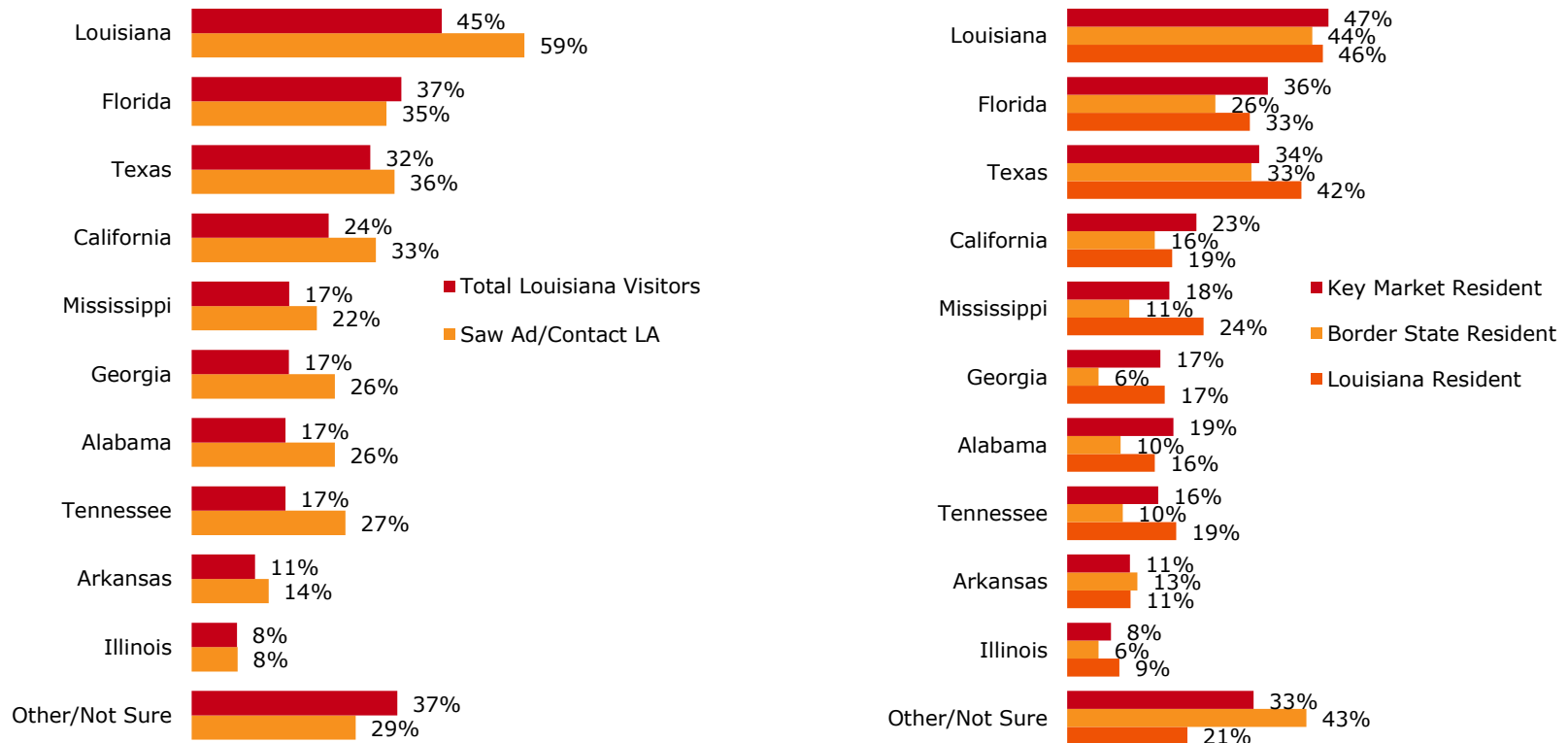
Competitive state and city destinations

Southern states (and California) compete with Louisiana

- Those who see ads/contact Louisiana Travel/visit website show much greater interest in visiting Louisiana than others – giving Louisiana a wider lead over competitors.

Future Areas Considered by Louisiana Visitors - Key Competitors

Base: Louisiana Visitors (n=522)



Q3: Which of these destinations will you consider for your next leisure vacation?



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Conversion



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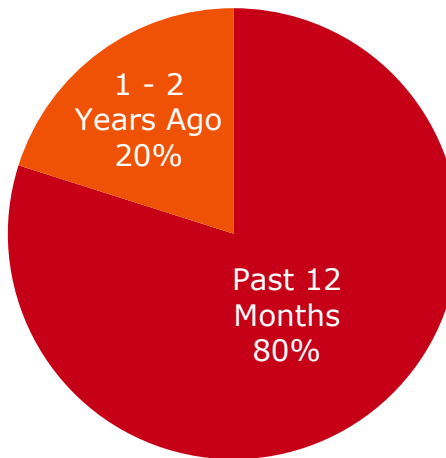
When last visited Louisiana

Market relevance

- Most of the recent Louisiana visitors have been there in the past year.

Last Visit to Louisiana

Total Visitors



Q4: Which of the following best describes your most recent travel to Louisiana?



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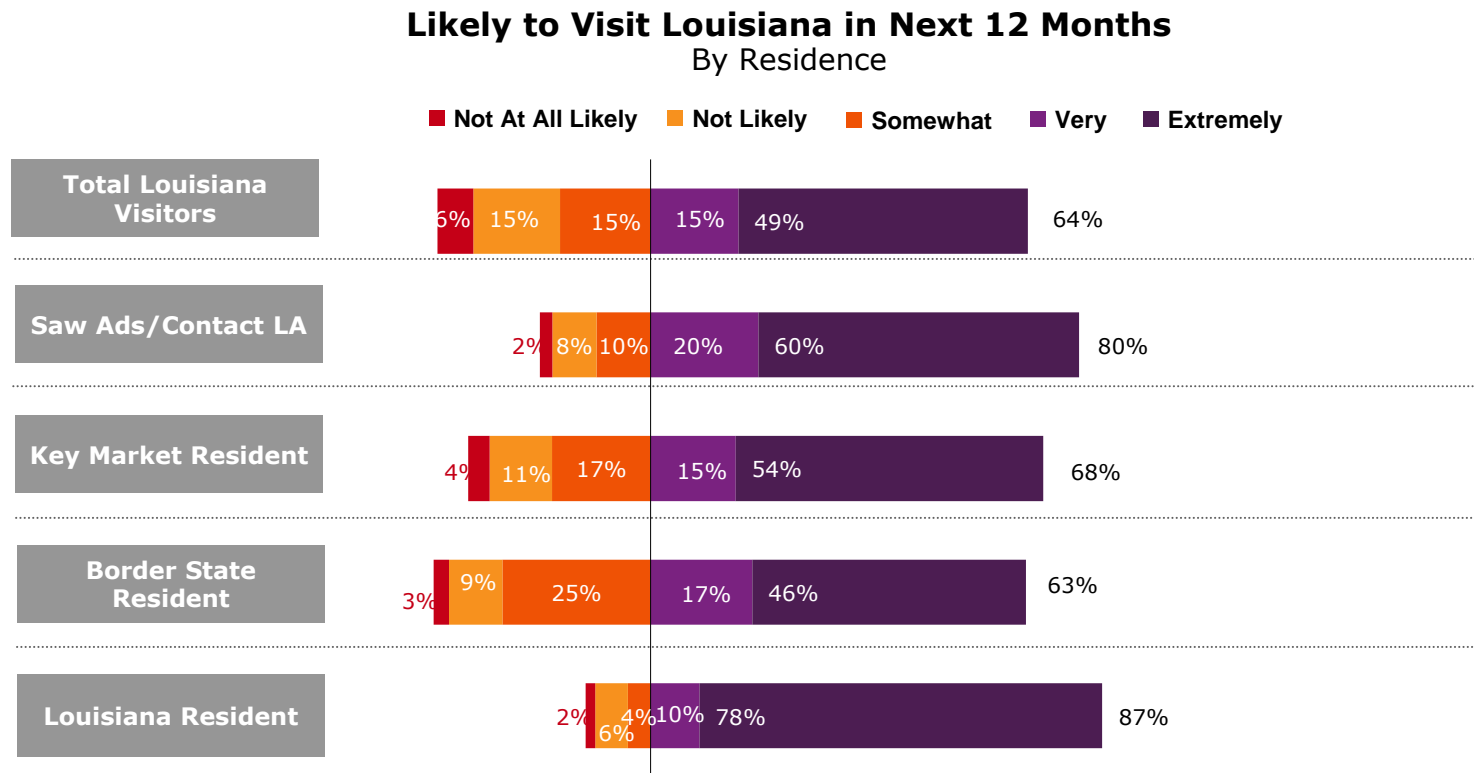
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Likely to visit Louisiana in next 12 months by residence

Two-thirds expect to return next year

- That ratio climbs even higher among Louisiana residents and those who recognize ads/contact Louisiana Travel/visit its website.

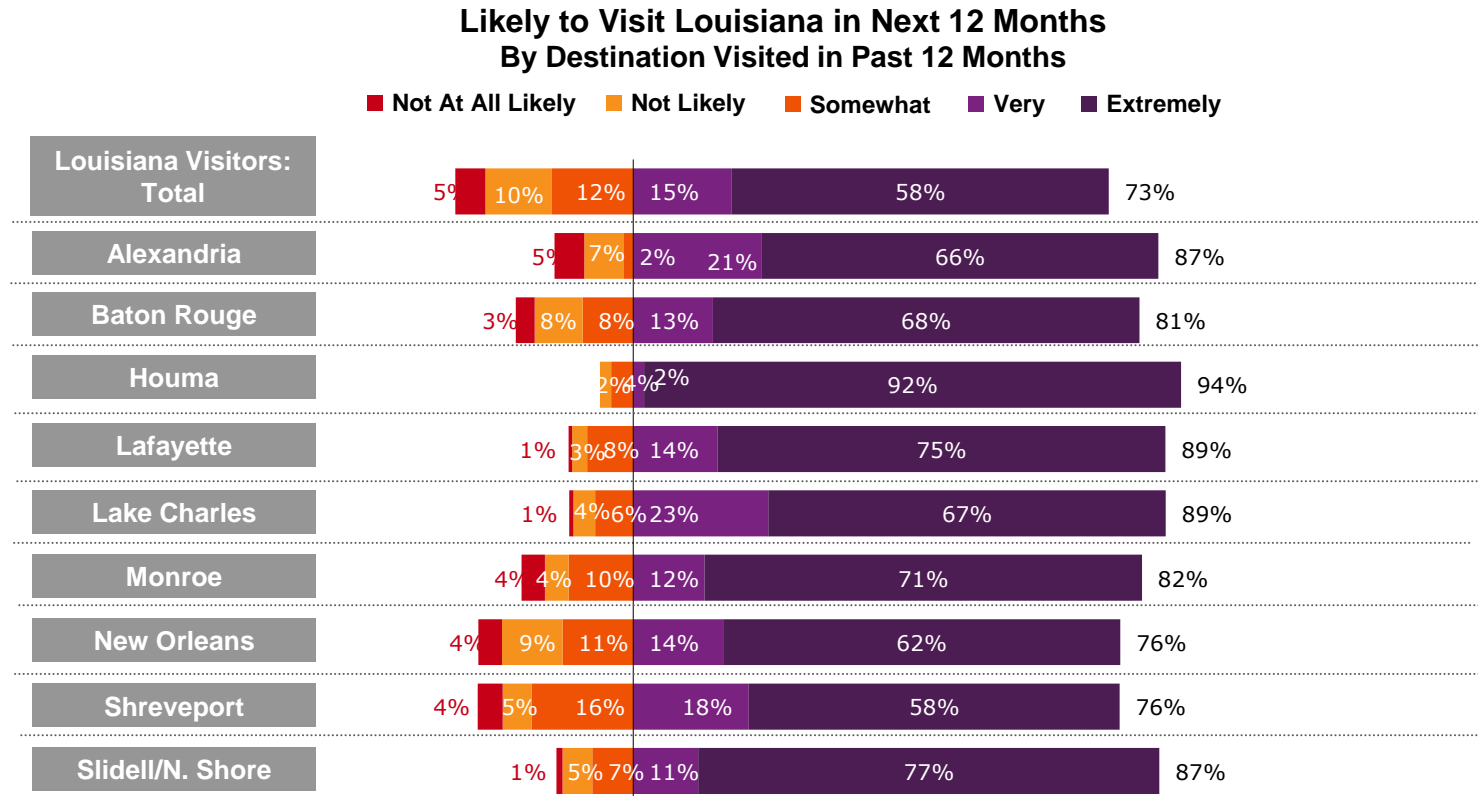


Q5: How likely are you to take a vacation or pleasure trip to Louisiana within the next 12 months?

Likely to visit Louisiana in next 12 months by destination

Each specific destination attracts repeat visitors

- New Orleans and Shreveport somewhat lag other areas on repeaters, but both rely heavily on out-of-state visitors, where it is less convenient to return soon.



Q5: How likely are you to take a vacation or pleasure trip to Louisiana within the next 12 months?

Awareness and impact of ads

Ad/marketing awareness varies by destination

- Overall, a quarter notice ads/marketing, particularly Alexandria and New Orleans visitors
- Many go to the website, especially those going to Alexandria, Houma, and New Orleans
- Of the media types, only online banner ads do not break single digits for any destination.

Impact of Ads

Base: Past Year Louisiana Visitors (n=415)

(%)	Past Year LA Visitors	Alexandria	Baton Rouge	Houma	Lafayette	Lake Charles	Monroe	New Orleans	Shreveport	Slidell/N. Shore
AWARENESS										
Any Ad/Contact LA	27	39	24	31	33	27	27	34	21	19
Saw Print	6	7	5	6	7	4	10	8	4	4
Saw Television	8	15	7	10	15	14	10	10	6	9
Saw Banner	3	7	2	6	3	4	7	3	3	3
Saw Social Media	6	18	9	17	8	10	7	9	7	1
Visited Website	15	21	15	23	13	15	11	21	14	11
LA Travel Request	8	7	4	21	6	8	3	11	5	4
IMPACT										
Any Positive Impact	18	23	13	19	15	15	17	24	15	8

Q28. Have you seen either of these print ads before?

Q34. Have you seen any of these online ads before?

Q37. Have you visited the www.louisianatravel.com website?

Q39. How did the ads or materials/information provided impact your decision to take a leisure trip to Louisiana?

Q32. Have you seen either of these commercials before on TV?

Q36. Have you seen any of these social media pages?

Q26. Did you request travel information from Louisiana Travel prior to your last visit?



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Effectiveness of ads

All ads/marketing generate enthusiasm for Louisiana

- The Louisiana Travel website dominates other advertising/contact in both magnitude and effectiveness.
- Television ranks second in number reached; social media ranks second in impact – especially for *convinced to book*.

Behavior Caused by Ads

Base: Saw Ads or Had Contact With Louisiana Travel/Website

Impact (%)	Total LA Visitors	Past Year LA Visitors	Request from LA Travel	Visited Website	Saw Print Ad	Saw TV Commercial	Saw Online Ad	Saw Social Media Pages
Base	127	112	43	76	28	37	13	27
Any Positive Impact	67	67	76	85	54	51	50	81
Seek More Information	35	36	48	48	31	29	27	38
Convinced to Book Trip	26	26	33	35	23	21	23	61
Lengthened Stay	17	18	23	25	15	27	41	40
Made Me Want to Return	40	42	44	55	31	26	32	51
Added Attractions to Visit	30	30	47	41	25	32	50	49
Went to Website After Ad	24	25	36	33	25	22	32	40
Went to Website During Search for Information	39	39	55	58	13	24	27	57
Followed Louisiana Travel on Facebook or Twitter	17	19	18	22	27	22	27	40
Asked for opinions/advice	17	18	22	18	31	21	14	21
Got LA Travel Email Newsletter	21	23	30	30	25	24	27	38
Got Official LA Tour Guide	29	27	44	37	27	29	37	47
Neutral Impact	36	36	20	36	40	45	45	30
Negative Impact	4	4	4	5	6	5	9	4

Q39. How did the ads or materials/information provided impact your decision to take a leisure trip to Louisiana?



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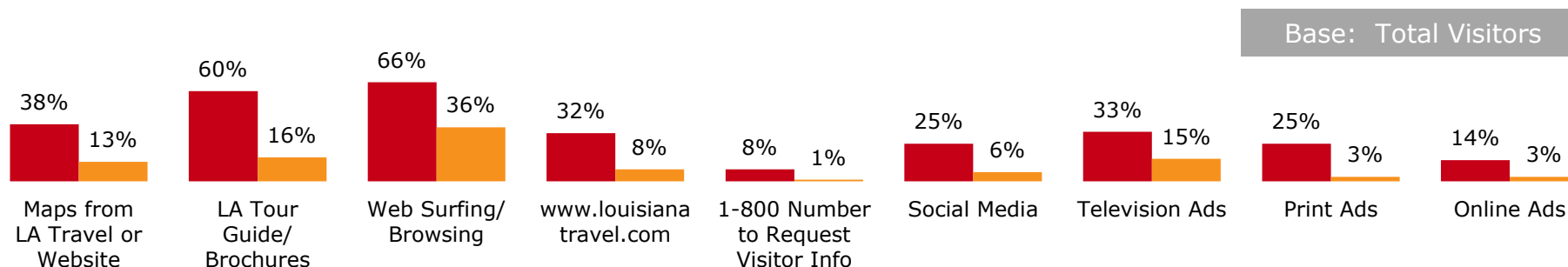
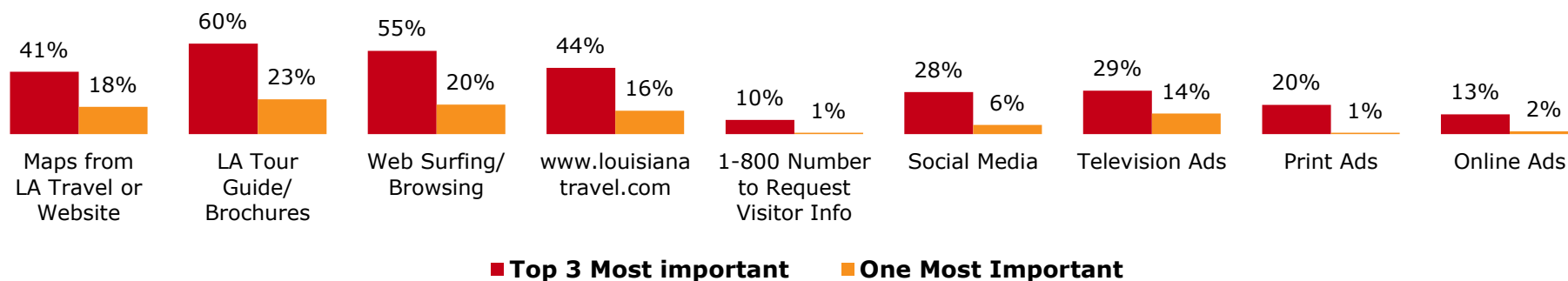
Effectiveness of ads

All marketing efforts build interest in Louisiana

- The *tour guide/ brochures*, *web surfing/website*, and *maps* lead other marketing efforts, but *television* and *social media* receive notable credit as well in impacting the Louisiana trip decision.
- General visitors (including those unaware of LA Travel's efforts) place even greater emphasis on *web surfing*.

Most Important in Louisiana Trip Decision Making

Base: Saw Ads or Had Contact With Louisiana Travel/Website



Q40. Which has the greatest effect on your decision to visit Louisiana?



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Visitor Demographics

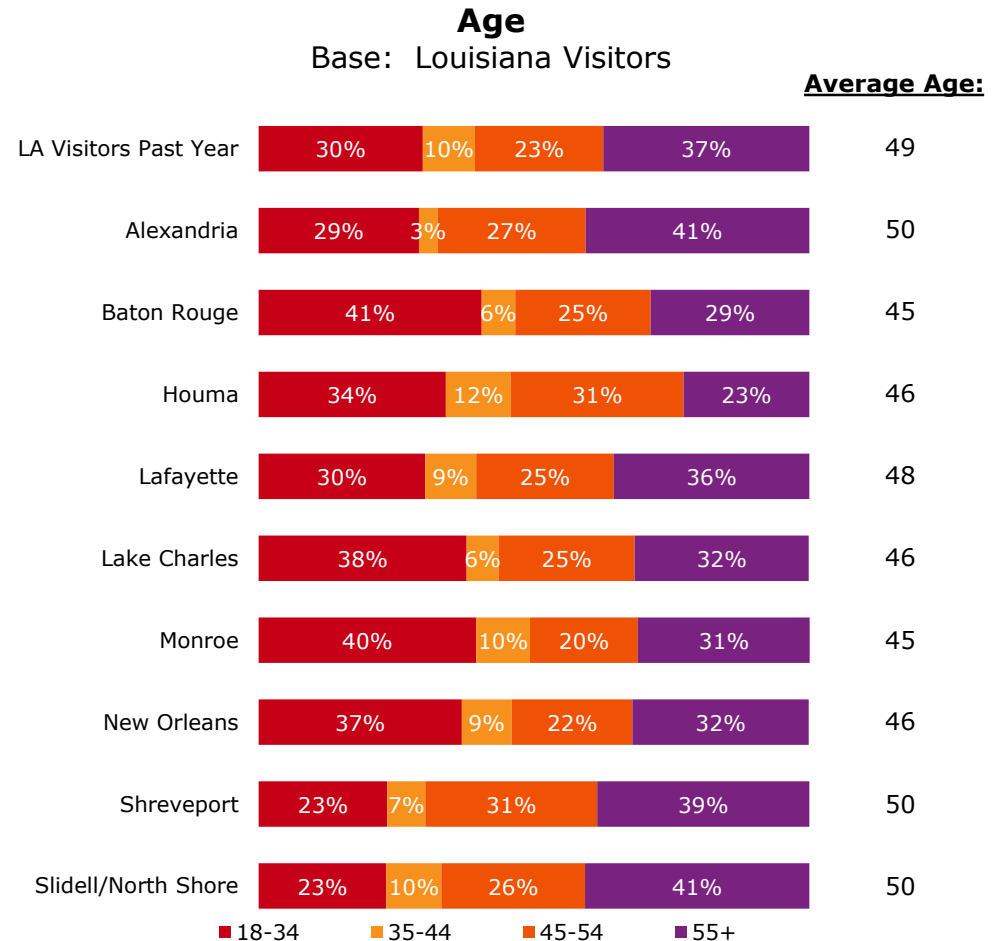


Visitor age by destination

Age varies somewhat by destination

Various Louisiana destinations attract somewhat differing age groups:

- Younger visitors tend to head for Baton Rouge, Lake Charles, Monroe, and to a lesser extent, New Orleans
- In contrast, Alexandria and Shreveport, where gaming is popular, and Slidell/North Shore attract older visitors.



Q1: How old are you?



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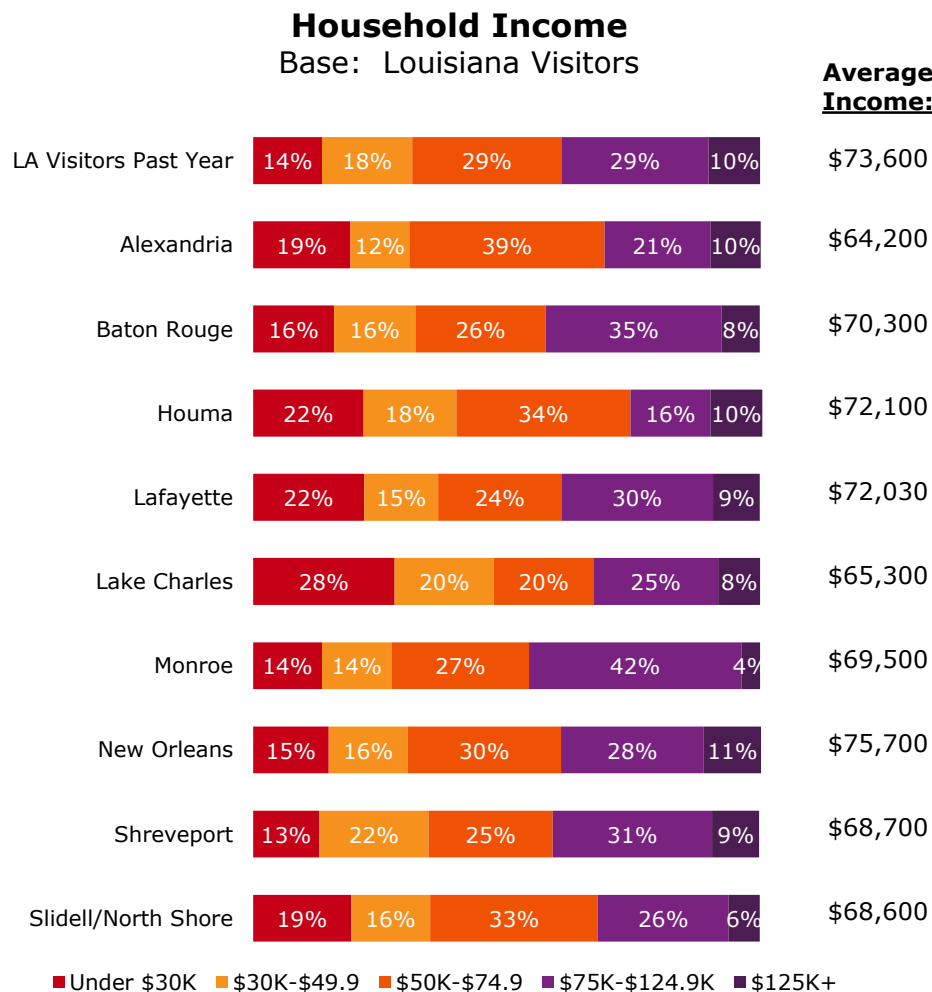
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Visitor income by destination

Income varies by Louisiana area destination

Some destinations draw more affluent visitors than others:

- New Orleans (drawing visitors from farther away), Lafayette, and Houma attract more affluent visitors
- Despite age groupings that vary markedly, Alexandria and Lake Charles both draw less affluent visitors.



Panel: Income



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Louisiana visitor characteristics by destination

Characteristics vary by Louisiana destination (summary)

Gender, Marital Status, Household Composition, Ethnicity

Base: Louisiana Visitors

Other Demographics	Past Year LA Visitors	Alex- andria	Baton Rouge	Houma	Lafay- ette	Lake Charles	Monroe	New Orleans	Shreve- port	Slidell/N orth Shore
Base:	333	30	116	29	76	71	47	203	93	57
% Married	62	63	61	80	67	63	61	60	64	70
% College Grad (4+ yrs)	48	52	54	70	47	48	44	46	44	49
Household Composition										
% One Person	18	23	18	10	20	14	6	19	13	15
% Two People	46	58	38	26	48	52	46	44	55	50
% Three or More	36	20	44	64	32	34	48	37	32	35
% With Children < 18	16	8	18	33	18	17	22	13	18	19
Ethnicity										
% Caucasian	79	94	79	82	84	71	72	74	82	86
% African-American	13	4	13	6	12	20	17	13	15	9
% Hispanic	2	-	1	4	2	3	-	3	1	3
Employment										
% Full Time	44	52	38	38	36	39	35	46	39	30
% Retired	24	25	19	14	26	27	21	19	25	27
% Other	32	23	43	48	38	34	44	35	36	43
O/N* Leisure P12M										
Average # Trips	4.3	4.2	4.4	6.0	5.3	5.2	3.7	4.7	4.7	5.6
Saw Ad/Contact LA										
Yes	27%	39%	24%	31%	33%	27%	27%	34%	21%	19%

Q2. How many leisure trips that required an overnight stay have you taken in the past 12 months?

Panel: Marital Status, Education, Household Members, Children, Ethnicity, Employment

*O/N = Overnight



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